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STRATEGY FOR

NEW BRUNSWICK'S

OUTFITTING SECTOR

TECHNICAL APPENDICES REPORT

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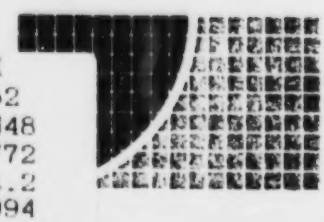

THE ECONOMIC PLANNING GROUP
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TECHNICAL APPENDICES REPORT

prepared by

THE ECONOMIC PLANNING GROUP of Canada

in association with

Washburn and Gillis Ltd.

January 1994

THE ECONOMIC PLANNING GROUP of Canada

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APPENDIX I

THE NEW BRUNSWICK OUTFITTING PRODUCT

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APPENDIX I

THE NEW BRUNSWICK OUTFITTING PRODUCT

INVENTORY OF OUTFITTERS

As of the late summer of 1993, there were 258 outfitters identified in New Brunswick, of whom 169 were licensed and 89 had applied for licensing during the recent lifting of the moratorium on licensing for this sector. Exhibit I-1 presents a summary of the licensed outfitters by New Brunswick Outfitters Association region, together with the number of bedrooms and number of guests which can be accommodated. The boundaries of these regions, together with the geographic distribution of outfitters is presented in Figure 1.

EXHIBIT I-1

NEW BRUNSWICK OUTFITTERS

REGION	No. of Outfitters			No. of Bedrooms	No. of Guests
	Licensed	Unlicensed	Total		
1	41	1	42	180	547
2	28	7	35	163	441
3	35	12	47	299	827
4	20	11	31	124	307
5	53	41	94	366	929
6	4	3	7	26	72
Total	169	89	258	1,158	3,123
Average Size				4.5 Units	12.1 Guests

As indicated above, the average size of outfitters in New Brunswick is 4.5 bedrooms with the ability to accommodate an average of just over 12 guests.

At the time of completing this study, 57 of the outfitters (18%) were members of the New Brunswick Outfitters Association. The number of members had reached

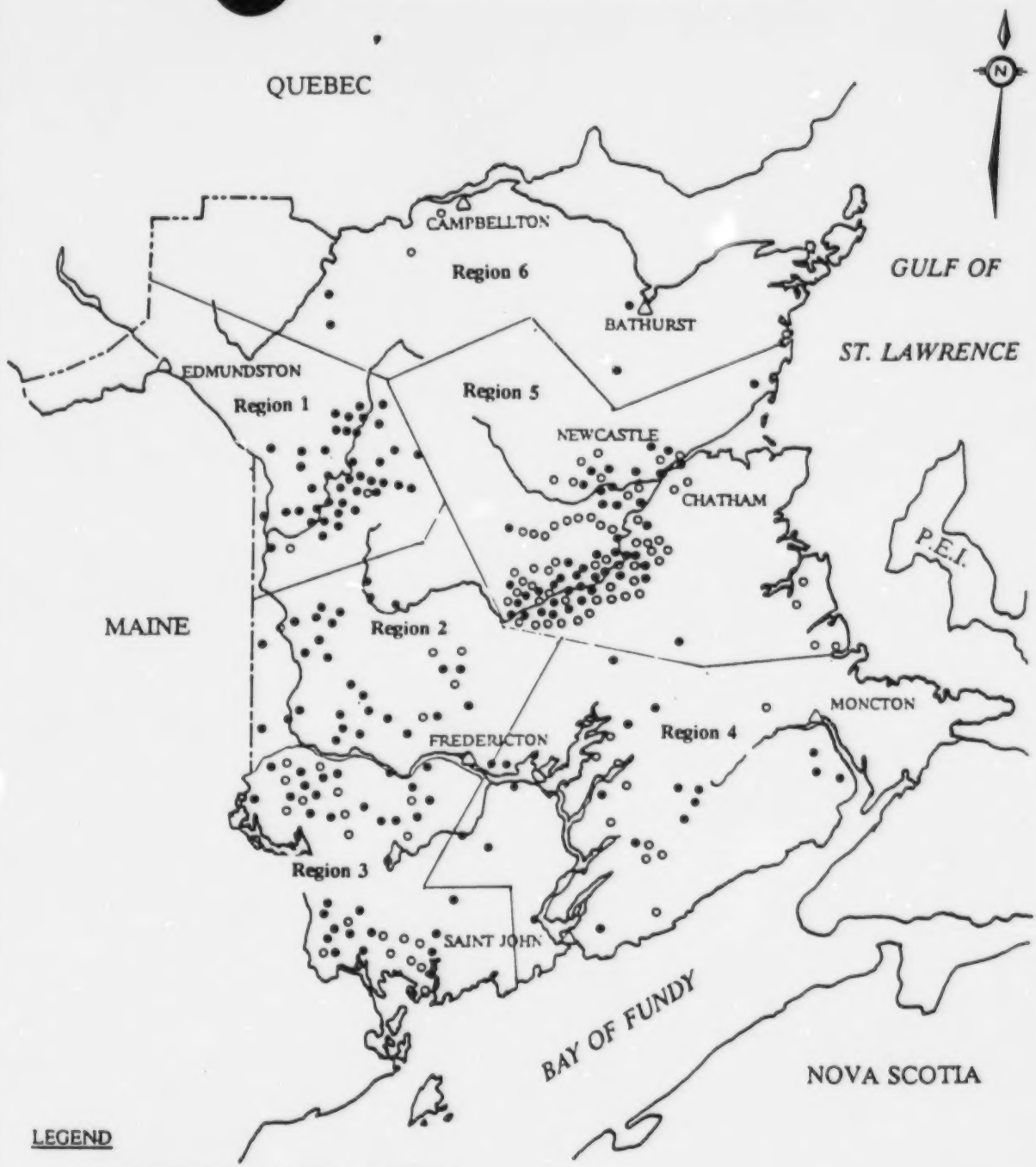


FIGURE 1

NEW BRUNSWICK OUTFITTERS ASSOCIATION REGIONS AND GEOGRAPHIC DISTRIBUTION OF OUTFITTERS

a high of some 130 - 140 members during the attempt to introduce outfitter legislation in the province but declined to a low of 30 after this initiative was tabled. Association members tend to be the larger and more comprehensive outfitters in the province.

The vast majority of outfitters in New Brunswick offer all types of outfitting, as indicated by the data presented in Exhibit I-2 on the species offered by the 169 operators who were licensed at the time of this research. (Data on the number of guests that can be accommodated by the non-licensed outfitters, by species was not available).

EXHIBIT I-2

CAPACITY OF LICENSED NEW BRUNSWICK OUTFITTERS BY SPECIES (Summer 1993)

REGION	Total Guests	Salmon	Trout	Deer	Bear	Upland Birds	Other
1	541	488	502	541	458	503	348
2	366	240	354	366	341	305	333
3	681	621	623	612	612	390	654
4	196	163	163	196	196	186	186
5	518	518	518	423	316	336	297
6	39	33	33	30	39	24	0
TOTAL	2,341	2,063 (88%)	2,125 (91%)	2,168 (93%)	1,962 (84%)	1,744 (74%)	1,824 (78%)

Note: Other includes waterfowl, bass, moose, shad, coyote, perch, pickerel.

KEY FINDINGS FROM THE SURVEY OF OUTFITTERS

As part of this assignment, the consultants conducted a survey of a sample of outfitters in New Brunswick. A random sample of 100 operators were selected from all outfitters having more than one accommodation unit, with representative proportions from each of the six outfitting regions. Letters were sent to each operators selected requesting their cooperation in the survey. Operators were then contacted by telephone to arrange personal interviews and a total of 56 interviews were completed. The completed survey represents 33% of the beds provided by outfitters in New Brunswick however, because the survey covered only licenses outfitters, the results cannot reliably be projected to the whole industry.

Membership in Organizations

ORGANIZATION	Number (%) of Outfitters who are Members
New Brunswick Outfitters Association	34 (61%)
New Brunswick Tourism Grading Authority	27 (48%)
Tourism Industry Association of New Brunswick	2 (3.5%)
Regional Tourism Association/Chamber of Commerce	4 (7.1%)
Other	9 (16%)

Products Offered

SPECIES	PRIMARY	SECONDARY
FISHING - 40 Outfitters (71%)		
Atlantic Salmon	23 (41%)	7 (12.5%)
Land Locked Salmon	2 (3.5%)	4 (7.1%)
Small Mouth Bass	8 (14%)	6 (10.7%)
Trout	2 (3.5%)	24 (42.8%)
Perch	2 (3.5%)	2 (3.5%)
Pickerel	1 (1.8%)	2 (3.5%)
Other	-	3 (5.3%)

SPECIES	PRIMARY	SECONDARY
Hunting - 50 outfitters (89%)		
Bear	35 (62.5%)	8 (14.3%)
Moose	0	2 (3.5%)
Deer	39 (69.6%)	5 (8.9%)
Woodcock	7 (12.5%)	18 (32.1%)
Upland Birds	9 (16.1%)	21 (37.5%)
Waterfowl	2 (3.5%)	4 (7.2%)
Coyote	1 (1.8%)	11 (19.6%)
Other	0	0

Non-Consumptive Products Includes canoeing, hiking, birdwatching, etc.	12 outfitters (21%)

Year of Incorporation and Opening of the Business

- only 25 outfitters were incorporated businesses, representing 45% of the sample
- 20% of the outfitters first opened for business before 1960; almost 60% opened between 1980 and 1990.

Additions and Upgrading

- A significant portion of outfitters have done upgrading/refurbishing in the past three years. However most of the upgrading and refurbishing work has been fairly minor - bathroom improvements, decks, some new camp facilities and basic repairs and maintenance.
- 12 outfitters made additions to their property between 1991 and 1993 and another 25 made additions between 1986 and 1990.

- 31 of the operators surveyed have future plans for the expansion of their business, ranging from adding new accommodation and support facilities to selling the business.

Facilities Provided

Accommodation

Accommodation	# of Units	# of Bedrooms	# of Beds
Cabins/Cottages	135	218	583
Rooms in Lodge	119	190	410
Housekeeping Units	8	15	30
Other Units	1	2	7
TOTAL	263	425	1,030

Bathroom Facilities

Units with Private Bath Total With Shower With Toilet With Bath	 189 (72% of total units) 95% 100% 26%
Units with Shared Bath Total With Shower With Toilet With Bath	 84 (28%) 97% 100% 42%
Properties with Common Washroom/Shower Building	5
Total Number of Full Baths	233 (88%)
Number of Properties with Pit Toilets	Pit Only - 1 Pit and Flush - 2

Support Facilities

FACILITY	Number of Properties
Main Lodge	44 (78.5%)
Dining Room	53 (94.6%)
Separate Lounge/Bar	30 (53.5%)
Separate Meeting Room	5 (9%)
Recreation Facilities on Site	19 (33.9%)

- recreation facilities are primarily such things as horseshoes, volleyball/basketball court, trails. Two properties have pools.

Equipment Available for Guest Use

EQUIPMENT	
Motorized Boat	35 (62.5%)
Row Boats	10 (17.8%)
Canoes	41 (73.2%)
Fishing Tackle	30 (53.5%)
Hunting Equipment	19 (34%)
Transportation to/from property available on request from client	51 (91%)

In addition, 7 properties have outpost camps providing 17 additional units of accommodation and 63 beds in total.

Staffing and Training

Staffing Problems

- 17 (30%) of operators indicated having problems finding appropriate staff particularly quality guides and cooks.

Average Number of Staff Per Property
(for the number of properties who reported having staff in each category)

	Part Time			Full Time	
	# Of Props.	Avg. # of Staff	Avg. Wks. Per Staff	# of Props.	Avg. # of Staff
Permanent Year Round (including owner)	36	2.5	N/a	21	1.5
Seasonal Staff - Fishing Season	22	3.7	4.4	4	7.5
Seasonal Staff - Hunting Season	38	3.0	3.3	0	0

Type of Staff
(Total for all reporting properties)

Type of Personnel	Hunting Season	Fishing Season
Guides	142	126.5
Cooks	36	30
Housekeepers	30	27

Participation in Training Programs

Owner/Operator	6 (10.7%)
Manager	1 (1.8%)
Guides	7 (12.5%)
Cooks	5 (8.9%)
Housekeeping	0

Perceived Need for Training Programs

- 44 (78.5%) operators indicated a need for training programs
- 34 (77%) indicated a need for guide training
- other training needs indicated were for hospitality services, safety and cooking.
- in all cases, the operators indicated a preference for local training carried out in the off-season
- the appropriate length of the training was seen to range from 10 hours to six weeks, although most respondents indicated that 1 -3 week training programs would be appropriate

Guest Profile

Origin of Guests

Origins	Hunting	Fishing
New Brunswick	1.5%	9.9%
Other Atlantic Canada	0.1%	1.6%
Quebec	7.3%	3.1%
Ontario	0.8%	5.1%
Other Canada	0	0.7%
New England	21.2%	39.1%
Mid-Atlantic	57.3%	32.7%
South Atlantic	4.4%	5.4%
Southern U.S.	4.3%	-
Other U.S.	1.3%	1.0%
Overseas	1.5%	1.0%
TOTAL	99.7%	99.6%

- It should be noted that, in most cases, outfitters were only able to provide estimates of visitor origins. The findings of the consumer survey (Section 3) indicate that New England was a more important origin for business and the mid-Atlantic a less important one.

Percentage of Bed Nights Occupied

YEAR	Fishing Season	Hunting Season
1991 Season	35.7%	37.4%
1992 Season	33.4%	37.6%
1993 Season	35.2%	38.5%

- Again, these numbers are based on estimates provided by outfitters.

Meetings Business

- only 7 operators reported that they did some meetings business
- the total number of meetings held at the properties increased from 13 in 1991 to 218 in 1993
- 85% of meetings business came from New Brunswick

Marketing Activities

Brochures

- 77% of operators had a brochure
- consumer shows and direct mail were the key methods used to distribute the brochures, as follows:

Consumer Shows	26 operators (60% of those having a brochure)
Direct Mail	31 (72% of those having a brochure)

Newsletter

- 12.5% of operators had a newsletter which was sent to past guests

Consumer Shows

- 59% of operators went to consumer shows
- the most popular shows visited were:
  - Worchester, Massachusetts (8)
  - Springfield Massachusetts (5)
  - Harrisburg, Pennsylvania (9)
  - various New York locations (Syracuse, Albany, Buffalo)

Magazine Advertising

- 45% of operators reported having advertised in magazines
- the magazines mentioned most often were Field and Stream, Aim and Angle, Deer and Deer Hunt, Grays Sport Journal

Direct Mail to Previous Customers

- 36% of operators reported using direct mail

Wholesalers

- 23% of operators reported using a wholesaler to help sell their hunting or fishing product

Other Marketing

- only 1 operator reported doing any other kind of marketing and one reported getting stories written as editorials

Use of 1-800 Number

- 1 operator reported current use of a 1-800 number

- 71% indicated that they would be prepared to financially support a provincial 1-800 number for outfitters

- the type of toll free number that outfitters would be prepared to support is:

- Provincial Number	4 (10%)
- Own Toll Free Number	13 (32.5%)
- Outfitter Association	24 (60%)

Financial Information

The financial information presented below has been calculated by the consultants based on the data provided to us by the outfitters interviewed. In many cases, this information was provided verbally and the consultants have not attempted to verify the data. As such, the conclusions about the financial performance of the industry should be viewed with some caution.

Capital Investment

- The total capital investment for 52 reporting properties was $24,047,000 or an average of $462,400 per property.

- The original construction costs of 50 reporting properties totalled some $16.7 million or an average of $333,700 per property.

Revenues

- The total gross revenues for 44 reporting properties was $2,639,000 or an average of some $60,000 per property.

- The total hunting revenues for the 37 properties providing this data was $1,235,900 or an average of $33,400 per property.

- The total fishing revenues for the 23 properties providing this data was $1,028,100 or an average of $44,700 per property.

Operating Costs

A breakdown of operating costs was provided by 46 properties. The total operating costs by major category and the average cost per reporting property are summarized below.

Operating Expense	Total	Average per Reporting Property
Labour (includes owner's salary)	$861,875	$18,740
Food & Beverage Supplies	$258,113	$5,611
Marketing	$162,936	$3,542
Transportation	$175,390	$3,810
Office and Administration	$172,300	$3,745
Travel	$37,764	$821
Business/Property Tax	$72,325	$1,570
Other	$201,200	$4,374
TOTAL EXPENSES	$1,941,900	$42,215

Operating Profit and Return

Average Revenue Per Property	$60,000
Average Operating Expenses Per Property	$42,215
Average Operating Profit Per Property (Pre Tax)	$17,785
Average Return on Total Investment, Pre Tax (Operating Profit/Total Investment)	3.8%
Operating Profit as a Percentage of Revenue	29.6%

Problems and Opportunities as Perceived by New Brunswick's Outfitters

The outfitters interviewed were also asked to provide their comments about problems, needs and market opportunities for their industry. A summary of the most frequently made comments is presented below.

Problems Facing the Industry

- Declining salmon and deer stocks
- Increasing competition from other destinations
- Too many outfitters in the province and particularly in some areas
- Clear cutting which is perceived to be having a negative impact on habitats, thereby contributing to declining deer and salmon stocks.
- Illegal outfitters
- A shortage of wardens and limited enforcement of resource regulations, illegal fishing and poaching
- Native fishing rights and activities
- Deterioration in the quality and quantity of salmon fishing pools

Needs

- Better and more controlled resource management practices
- Regulations which assign hunting areas and quotas by zones within the province
- Improved guide training and changes to guide regulations to ensure that licensed guides have better skills
- A stronger Outfitters Association with a greater voice on behalf of the industry and more support
- Increased awareness of the province's product in new market areas, and more advertising and marketing generally

- More input into government regulations and resource management issues
- Decrease in the number of outfitters obtained partially through better control of illegal outfitters
- Better control of illegal fishing and hunting by both resident and non-resident sports

Market Problems

- There has been a general decline in business due to economic conditions, declining stocks and stricter regulations on salmon and deer. This problem has been compounded by the increasing number of outfitters, both legal and illegal.
- There has been a decline in demand from the traditional primary market area of New England.

Perceived Market Opportunities

- Non-consumptive markets such as canoeing, birdwatching, nature photography, hiking, cross-country skiing
- Snowmobiling
- Spousal packages, particularly in conjunction with salmon fishing
- Combination packages including both hunting and fishing
- Upland bird hunting with dogs
- Coyote hunting
- Getaway weekend market
- South Atlantic markets for hunting, particularly bird hunting
- Mid-Atlantic market because of its relative proximity and large population base

- United Kingdom for salmon fishing
- West Coast United States for salmon fishing
- Texas and Florida for big game hunting and salmon fishing
- Ontario
- mid-West United States, Tennessee and Virginia

APPENDIX II

THE CONSUMERS OF NEW BRUNSWICK'S OUTFITTING PRODUCT

APPENDIX II

THE CONSUMERS OF NEW BRUNSWICK'S OUTFITTING PRODUCT

VOLUME OF CONSUMERS

The consumers of New Brunswick's fish and game resources include both resident and non-resident markets. Given that this is a Strategic Plan for the outfitters businesses, and that the resident market accounts for only a small portion of business at outfitters (1.5% of hunting business and 10.3% of fishing business), the focus of this discussion is on the non-resident markets.

The total size of the non-resident market is illustrated in Exhibit II-1, which describes license sales, by type, for the past three years. The total non-resident license sales in 1992 were 15,585 of which some 41% were salmon licenses and 23% were other fishing licenses. Some 36% of the total licenses sold were hunting licenses. These numbers include licenses sold to persons between the age of 10 and 16.

Not all of the non-residents purchasing licenses stay with outfitters - many stay with friends and relatives or in other types of accommodation. Based on the consumer survey conducted as part of this study, we have estimated that the approximate number of non-resident license holders staying with outfitters is as follows:

Type of License	Total Licenses Sold (1992)	Percentage Staying at Outfitters	Estimated Number of Non-Resident License Holders Staying at Outfitters
Deer	2,557	26.9%	690
Bear	1,851	81.0%	1,500
Bird	551	100.0%	551
Atlantic Salmon	6,455	73.5%	4,744
Other Fishing	4,171	53.3%	2,223
TOTAL	15,585	62.3%	9,708

EXHIBIT II-1

RESIDENT AND NON-RESIDENT HUNTING AND FISHING LICENSES (1990 - 1992)

TYPE OF LICENSE	RESIDENT	NON-RESIDENT	TOTAL
Deer			
1990	82,002	3,850	85,852
1991	82,391	2,856	85,247
1992	80,592	2,557	83,149
Bear			
1990	984	2,413	3,397
1991	887	1,827	2,714
1992	854	1,851	2,705
Birds			
1990	15,325	550	15,875
1991	16,680	474	17,154
1992	17,951	551	18,502
Salmon			
1990	28,923	6,750	35,673
1991	26,683	6,257	32,940
1992	25,771	6,455	32,226
Other Fishing			
1990	60,477	4,328	64,805
1991	62,836	4,361	67,197
1992	64,823	4,171	68,994
TOTAL			
1990	187,711	17,891	205,602
1991	189,477	15,775	205,252
1992	189,991	15,585	205,576

Source: Statistics obtained from the New Brunswick Department of Natural Resources and Energy.

Although the licenses do contain the names and addresses of the license holders, data on the origins of license holders is not currently tabulated by the Department of Natural Resources and Energy.

The sale of licenses to non-resident sports generated some $685,000 in revenue for the province in 1992, some 19% of the total revenue generated from the sale of all hunting and fishing licenses in the province.

KEY CHARACTERISTICS OF NON-RESIDENT SPORTS

Methodology

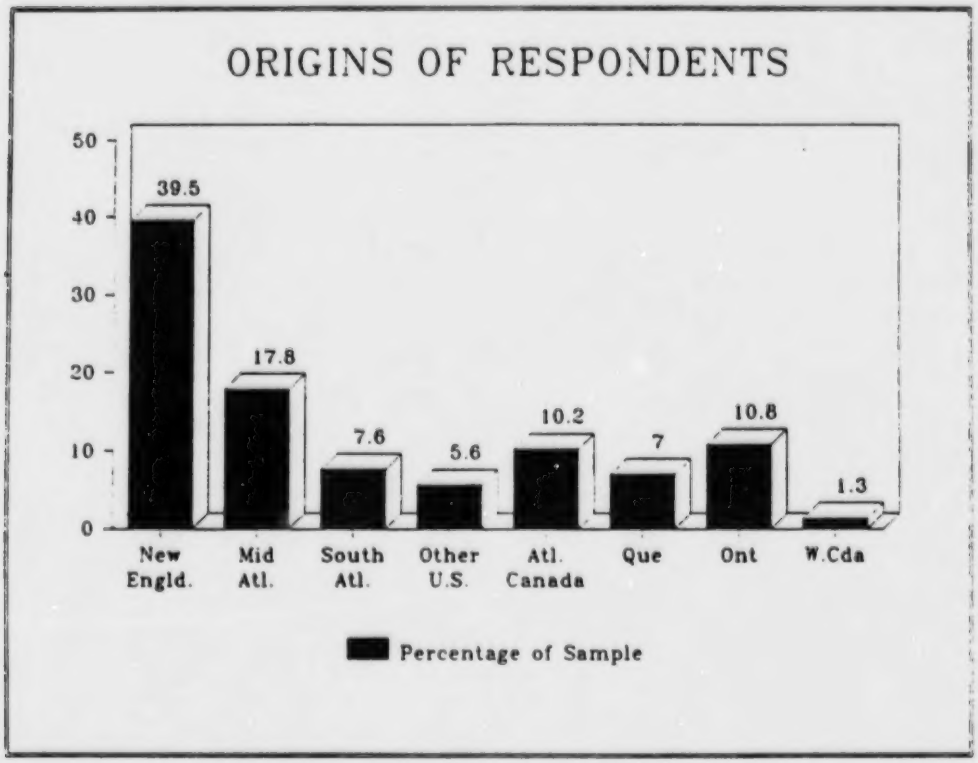
A telephone survey of 157 non-resident sports was conducted as part of this study. A random sample was selected from 1992 non-resident license holders, with representation from each type of license holder in proportion to the number of licenses sold of each type. The results, therefore, can be considered representative of the total market of non-resident sports in New Brunswick. The number of interviews by type of license was as follows:

LICENSE TYPE	INTERVIEWS CONDUCTED	
	Number	Percentage of Total
Bear	21	13.4%
Deer	30	19.1%
Birds	8	5.1%
Salmon	68	43.3%
Other Fishing	30	19.1%
TOTAL	157	100.0%

The findings of the consumer research have been analyzed by type of license and by type of accommodation used as well as for the total sample of those surveyed. The findings for the total sample are presented on the following pages with a discussion of findings by type of license and type of accommodation where there are significant differences from the results for the total sample.

Origins

The places of residence of respondents to the survey are illustrated below.



For the total sample, New England was the main origin point with almost 40% of sports from this region. The Mid-Atlantic region (New York, New Jersey and Pennsylvania) as the second most popular origin (17.8%) followed by Ontario (10.8%) and Atlantic Canada (10.2%). There were some significant differences by type of license, as follows:

- 47.6% of bear license holders were from the Mid-Atlantic with only 14% from New England
- 50% of bird license holders and almost 47% of deer license holders

were from New England

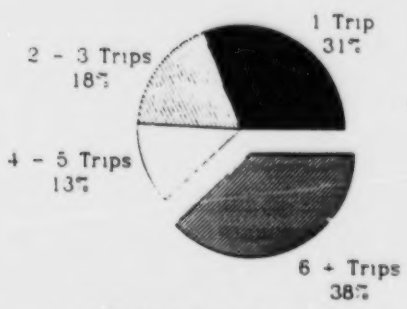
- 12% of salmon license holders were from the South Atlantic
- 17% of deer license holders and 13.3% of other fishing license holders were from Ontario

Respondents staying at sports lodges were slightly more likely to be from the United States than was the total sample.

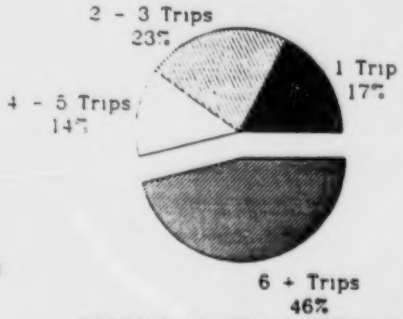
Frequency of Travel to New Brunswick

Both hunting and fishing sports are frequent visitors to New Brunswick as indicated in the following figure. 38% of the respondents who had hunted in New Brunswick and 46% of those who had fished had made more than six trips to the province. However, 31% of hunters and 17% of anglers made their first trip in 1992.

NO. OF TRIPS TAKEN TO NEW BRUNSWICK



PERCENTAGE OF 72 PERSONS WHO HAD HUNTED



PERCENTAGE OF 115 PERSONS WHO HAD FISHED

Holders of bear licenses were much more likely to be on their first trip to the province (47.6%) and 62.5% of bird license holders had made six or more trips to the province. Also, sports staying at private cottages or with friends and relatives were more likely to have made more than six trips to the province.

Trip Characteristics

Trip Purpose and Activities

Fishing was the main purpose of their last trip to New Brunswick for 62.4% of respondents with hunting the main trip purpose for 37.6% of respondents. However, 40% of respondents reported participating in hunting and almost 66% participated in fishing indicating that there some portion of sports participate in both hunting and fishing while on a trip to the province. Some 24% of respondents reported participating in other outdoor activities which were not associated with hunting or fishing. Almost one-third of respondents indicated that they spend time in New Brunswick other than for fishing and hunting with hunters and non-salmon anglers being the most likely to spend additional time in the province. Respondents staying at lodges were less likely to spend additional time in the province.

Region Visited and Accommodation Used

The destination regions within New Brunswick of the sports interviewed were well distributed throughout the province, as illustrated in the figure on the following page. Almost one-third of sports went to Region 5 (the Miramichi area), with some 22 - 23% visiting each of Region 3 (the Saint John/St. Andrews area) and Region 2 (the area north of Fredericton).[1]

The type of accommodation used by the non-resident sports interviewed is also illustrated below. 55% of respondents stayed at a hunting/fishing lodge with an other 10% staying at a commercial cottage/camp/outpost. 10% stayed with friends and relatives and 17% in private cottages or cabins. Bear hunting sports (81%) and bird hunting sports (100%) were the most likely to stay at hunting/fishing lodges. Deer hunters were the most likely to stay at private cottages/cabins or with friends and relatives.

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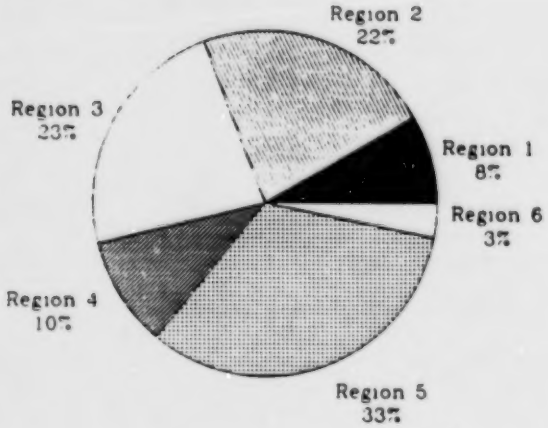
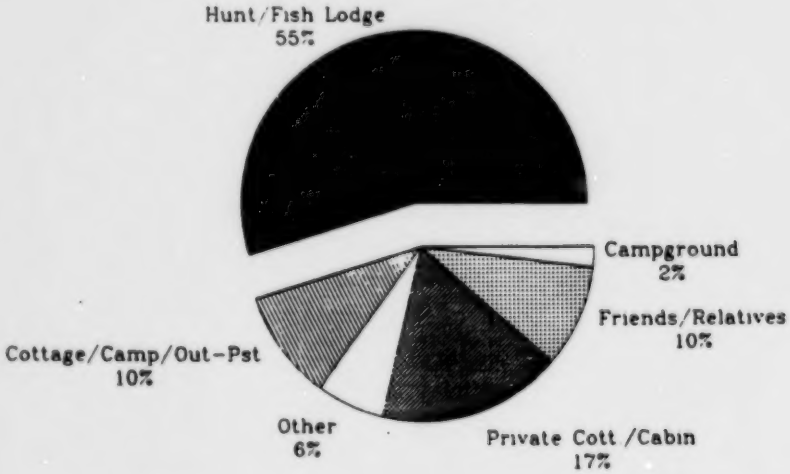
[1] The regions referred to are the New Brunswick Outfitters Association Regions and are illustrated in the Exhibit in Appendix I.

MAIN LOCATION OF FISHING/HUNTING (NBOA REGIONS)



TYPE OF ACCOMMODATION USED (on Last Trip)



(Other includes resort, hotel/motel, inn/B&B and other)

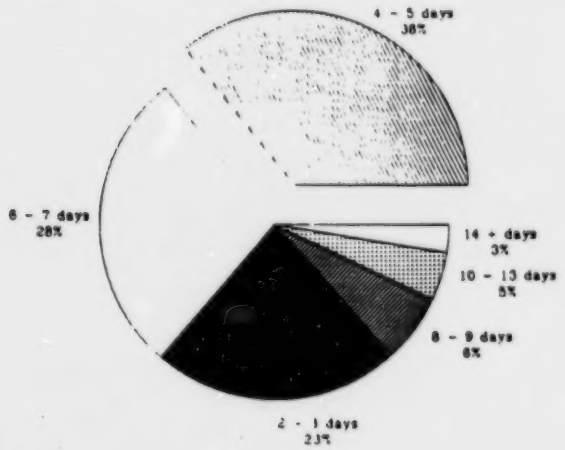
Length of Visit and Trip Expenditures

The average length of stay in New Brunswick for non-resident sports is 5.4 days. Bird hunters stay the longest (7.0 days) with non-salmon anglers having the shortest length of stay (4.3 days), as illustrated in the following table:

LICENSE TYPE	AVERAGE LENGTH OF STAY
Bear	5.3 days
Deer	6.3 days
Birds	7.0 days
Salmon	5.3 days
Other Fishing	4.3 days
TOTAL SAMPLE	**5.4 days**

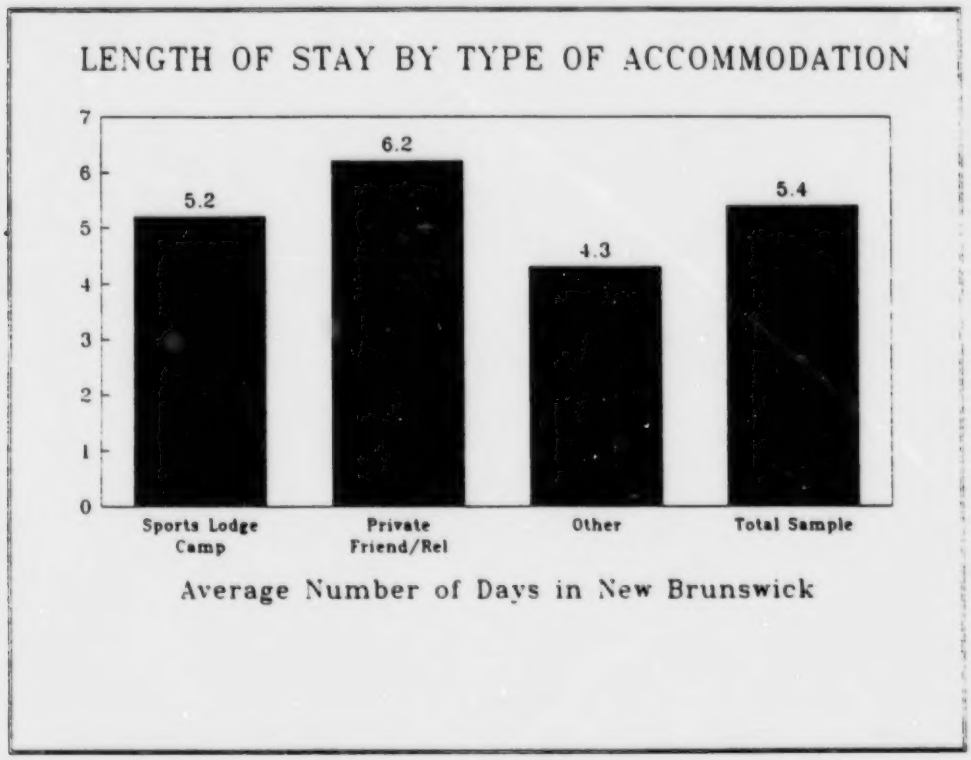
The percentage of respondents staying in New Brunswick for different lengths of time is illustrated in the figure below.

NUMBER OF DAYS SPENT HUNTING/FISHING
(ON LAST TRIP TO NEW BRUNSWICK)

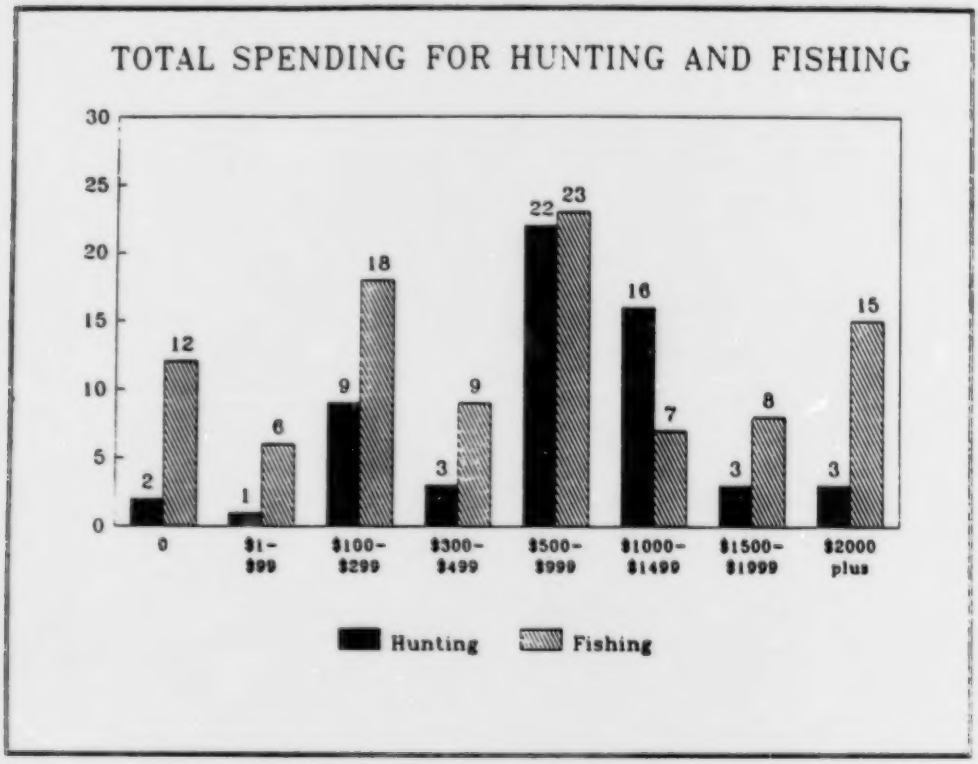


Average Number of Days - 5.4

Sports staying at private cottages or with friends and relatives stay longer (6.2 days) than sports staying at sports lodges and camps (5.2 days), as illustrated below.

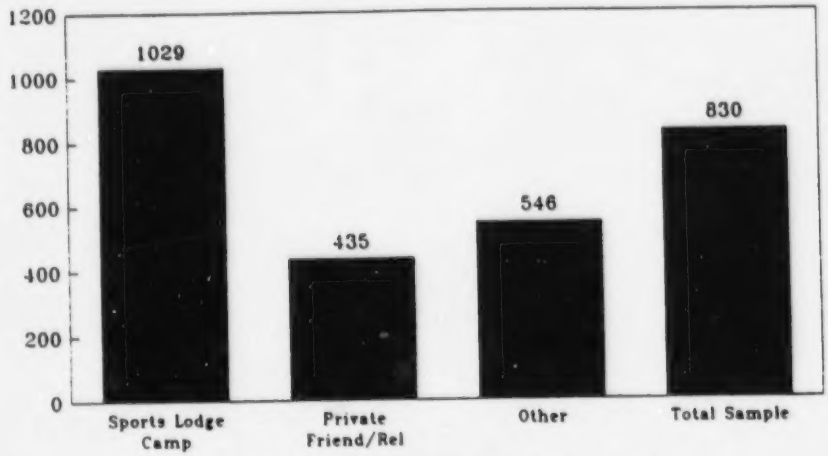


The average spending by respondents on hunting and fishing on their last trip to New Brunswick was $830. Bird hunters had the highest level of spending ($1,093.75) closely followed by bear hunters ($1,016.67). Salmon anglers spent an average of $951 with deer hunters and other anglers spending approximately $600. The figure below illustrates the distribution of spending for hunters and anglers. Although the average spending on hunting is higher than on fishing, there are a greater number of higher spending anglers than there are hunters.



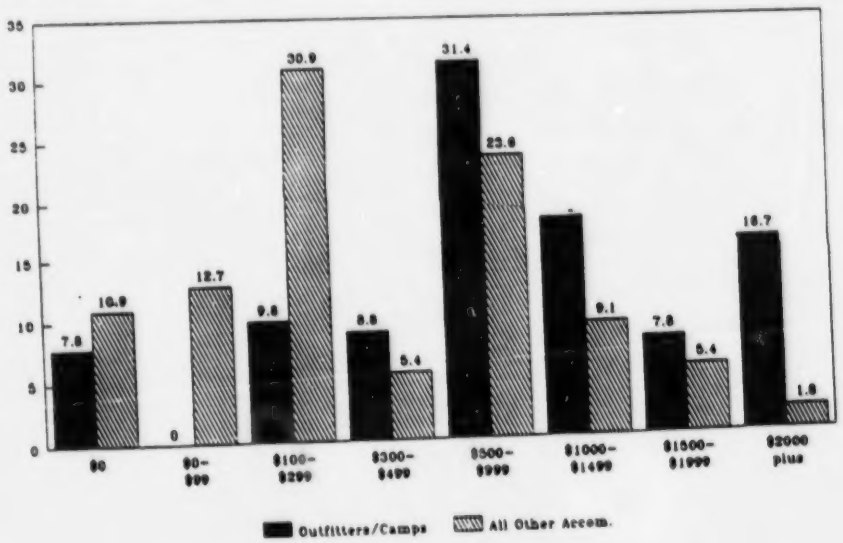
When the average spending levels are compared by type of accommodation, it is clear that the sports staying at hunting and fishing lodges contribute significantly more to the economy. As illustrated on the following page, the average spending of respondents staying at sports lodges and camps is $1,029 compared to an average of $435 for those staying with friends and relatives and $546 for those staying in other forms of accommodation. The distribution of spending by type of accommodation is also illustrated on the following page.

SPENDING BY TYPE OF ACCOMMODATION



AVERAGE SPENDING (Dollars)

SPENDING BY TYPE OF ACCOMMODATION
Percentage of Respondents



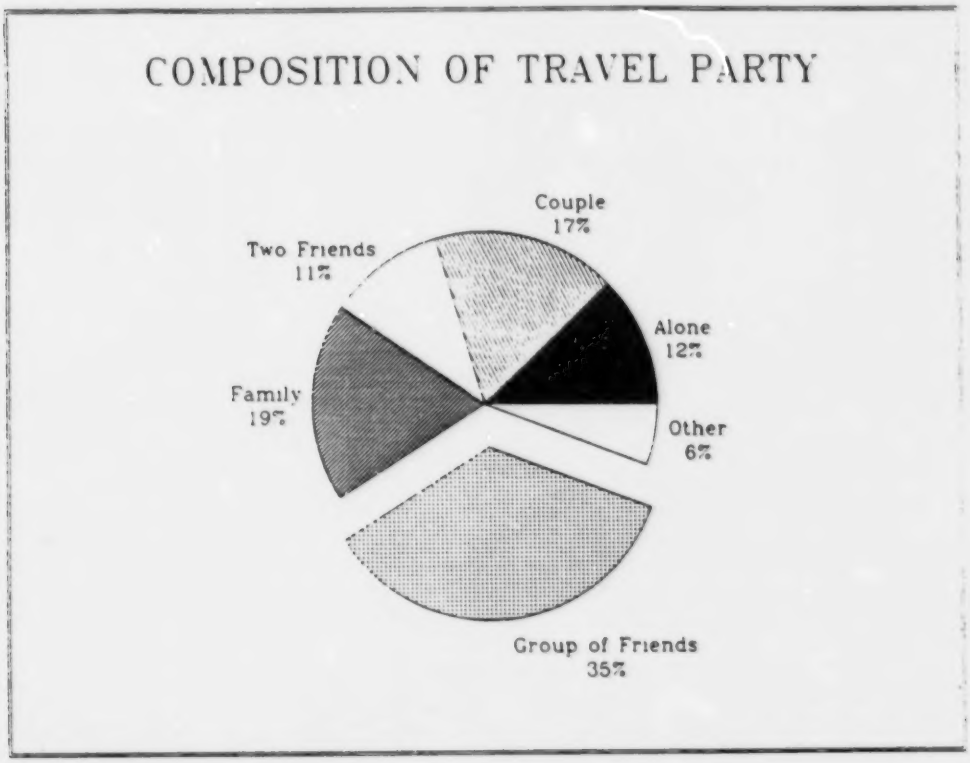
The average spending per day length of stay by license type and by type of accommodation used is presented in the table below. Bear hunters and salmon anglers have the highest rate of daily spending. Respondents staying at sports lodges have the highest rate of daily spending by accommodation type, spending almost $200 per day, on average.

Average Spending Per Day Length of Stay

Category	Spending	Length of Stay	Average Spending Per Day
License Type			
Bear	$1,016	5.3 days	$191.70
Deer	$607	6.3 days	$96.35
Bird	$1,094	7.0 days	$156.28
Salmon	$951	5.3 days	$179.43
Other Fishing	$578	4.3 days	$134.41
Accommodation Type			
Sports Lodge	$1,029	5.2 days	$197.88
Private Cottage/Friends	$435	6.2 days	$70.16
Other	$546	4.3 days	$126.97

Travel Party Composition

Almost one third of respondents reported that their last trip to New Brunswick was made with a group of friends. Some 36% were travelling as a couple or with their family, as illustrated in the figure on the following page. Bear hunters were the most likely to be travelling in a group of friends (47.6%) and other anglers were most likely to be travelling as a couple or with family (56.7%). Respondents staying at sports lodges were somewhat more likely than the total sample to be travelling with a group of friends (40.2%).



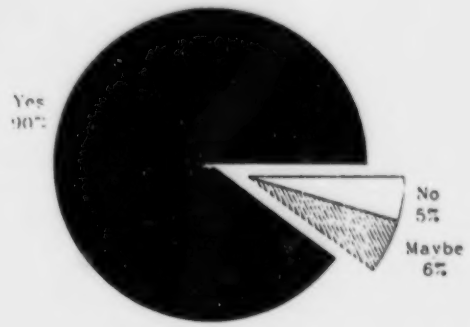
Future Intentions

The future intentions of respondents about their travel to New Brunswick for hunting or fishing and the types of accommodation they intend to use are illustrated in the figures on the following pages.

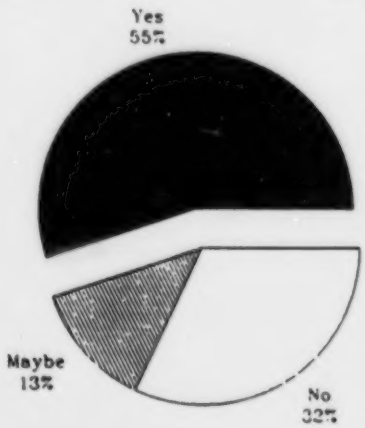
The vast majority (90%) of respondents indicated that they planned to return to the province for a hunting or fishing trip and 55% indicated that they intended to stay with an outfitter on their next trip. Those who had stayed at sports lodges were most likely to intend to do so in the future. The most frequent reason cited for not planning to stay with an outfitter was a preference for staying with friends and relatives. Respondents were asked about their interest in staying at a housekeeping cottage on their next hunting/fishing trip - 33% were very interested

and another 30% were somewhat interested in this type of accommodation. Respondents staying at lodges were more likely to be interested in housekeeping cottages than the total sample.

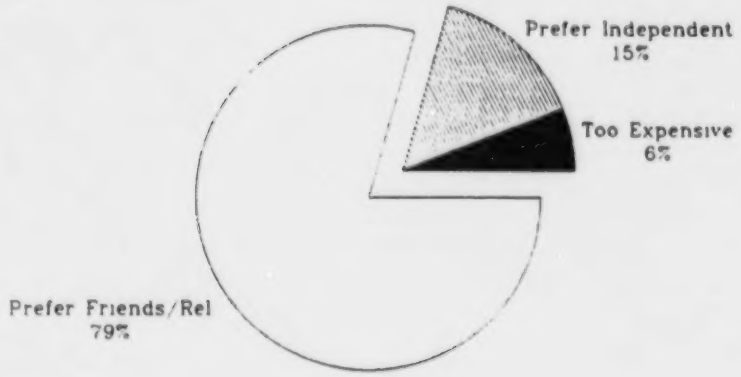
PLAN TO RETURN TO NB FOR HUNT/FISH TRIP



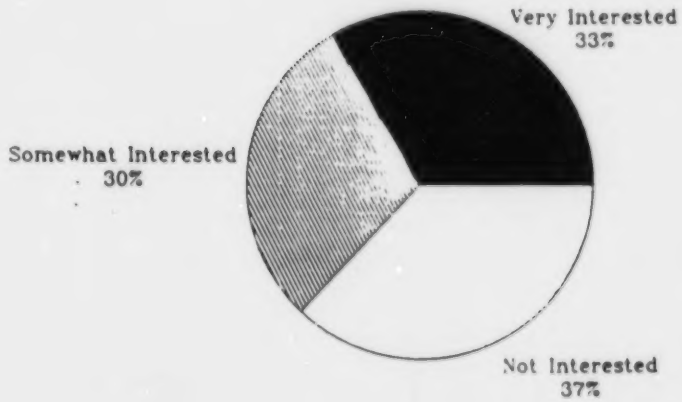
INTEND STAY WITH OUTFITTER ON NEXT TRIP
(Percentage of 147 Responses)



WHY DO NOT PLAN TO STAY WITH OUTFITTERS
(Percentage of 34 respondents)



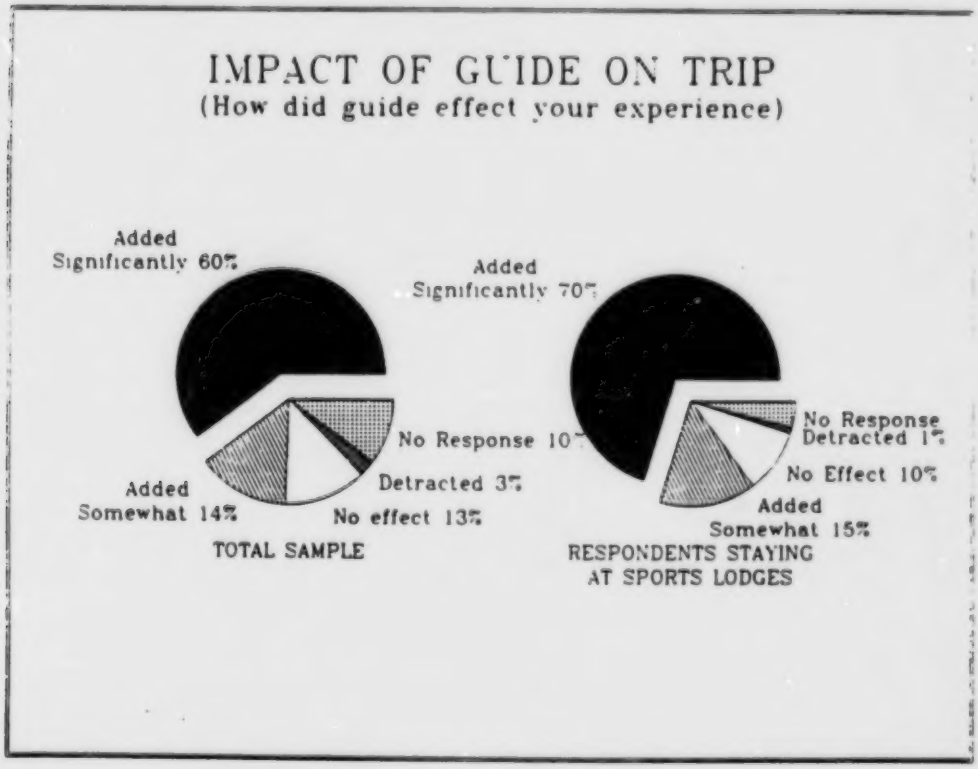
INTEREST IN STAYING AT HSK COTTAGE
(While on Hunting/Fishing Trip)



Other Issues

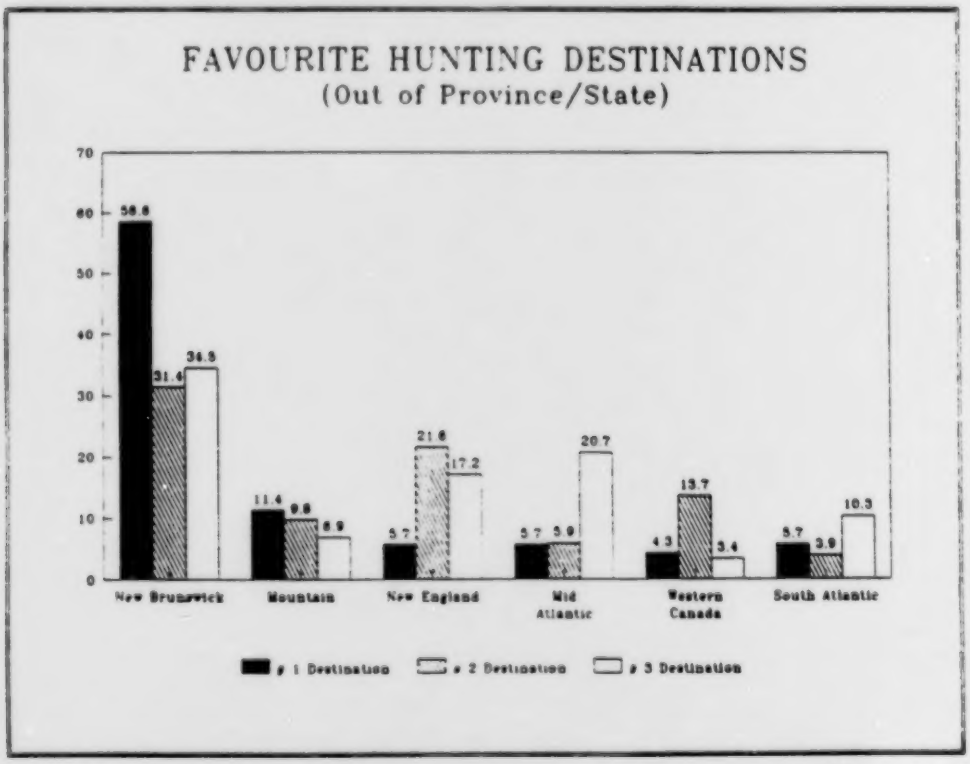
Impact of Guide

Respondents were asked "how do you think having a guide with you on your hunting/fishing trip in New Brunswick affected your experience?". 60% of respondents indicated that a guide added significantly to the success of the trip and 14% indicated that the guide added somewhat to the success of their trip. Only 5% felt that the guide detracted from their overall experience. The figures below also illustrate the responses to this question for persons staying at sports lodges - over 70% of these respondents felt that having a guide added significantly to the success of their trip and 15% felt the guide added somewhat to the experience.



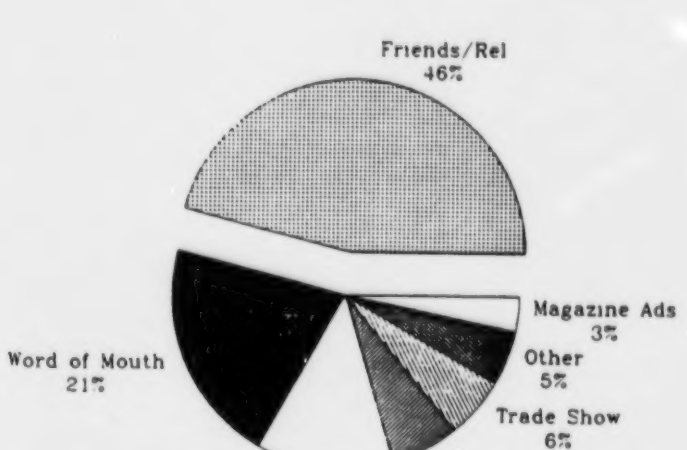
Awareness

Respondents were asked about their most popular out-of-state/province destination for hunting and fishing. The figure below illustrates the top three destinations reported. New Brunswick was rated as the number one destination by almost 59% of respondents and the number two destination by another 31%. New Brunswick is a particularly popular destination for deer hunters (ranked #1 by 78%) and bird hunters (62%) but is less popular for salmon fishing (ranked #1 by only 29%). New Brunswick was also a more popular destination for persons staying at private cottages or with friends (67% of this segment ranked N.B. #1) than for those staying at sports lodges/camps (51% ranked N.B. #1).

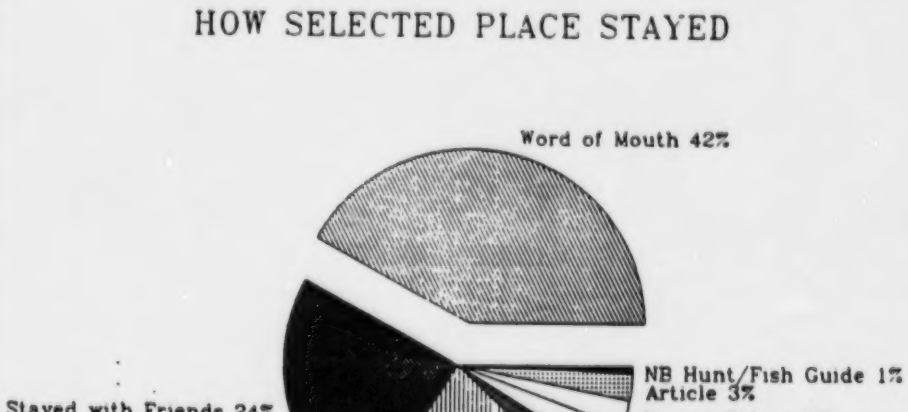


Word of mouth, including friends and relatives, was by far the most frequently cited way in which respondents heard about hunting and fishing opportunities in New Brunswick and selected a place to stay. Some 15% of respondents heard about opportunities in New Brunswick from a trade show, article or magazine ad. Similarly, only 10% of respondents selected the place they stayed through these sources. The two figures on the following page illustrate these findings.

HOW HEARD ABOUT HUNT/FISH IN N.B.



HOW SELECTED PLACE STAYED



CONSUMER PERCEPTIONS ABOUT NEW BRUNSWICK'S OUTFITTING PRODUCT

Consumer perceptions about New Brunswick's hunting and fishing product have been obtained from two sources - the consumer survey described above and interviews with product wholesalers.

Product Perceptions from the Consumer Survey

Respondents were first asked to indicated how important a series of factors were in selecting a destination for their hunting or fishing trip. Exhibit II-2 presents the responses to this question for the total sample, and for guests at sports lodges. The most important factors in selecting a destination were the species available at the destination and the experience, knowledge and availability of guides followed by the reputation of the area for hunting or fishing. These factors were slightly more important to respondents staying at sports lodges and, as might be expected, the quality of hunting and fishing lodges was also very important to this segment of the market. Respondents were also asked to identify any other factors which were important; those identified included the availability of bow and arrow hunting (3 respondents), regulations such as fishing limits (3 respondents), water conditions (2 respondents) and a range of other factors such as safety, not too many hunters or anglers, weather and the attitude of staff and local residents

Consumers were then asked to indicate how New Brunswick compared to other destinations on a series of factors, as described in Exhibit II-3. Generally, New Brunswick was compared very favourably with competing destinations. The overall quality of accommodations, food and service were rated particularly highly, especially by those who stayed at sports lodges. The experience and knowledge of the guides was also rated highly, moreso by those staying at sports lodges. However, compared to the factors described above, New Brunswick did not rate as well on the species available, a factor very important to consumers. Also, the province's rating with respect to the quality of the resource, the likelihood of a kill/catch and price were notably lower than the rating on facilities and services. In fact, 22% of respondents thought that New Brunswick compared poorly or very poorly to other destinations with respect to the likelihood of kill or catch and 13% thought it compared poorly or very poorly with respect to the species available.

EXHIBIT II-2

IMPORTANCE OF VARIOUS FACTORS IN SELECTING A DESTINATION FOR HUNTING OR FISHING
(Percentage indicates factor is important or very important)

	TOTAL SAMPLE	GUESTS AT OUTFITTERS
PRICE	40.1%	40.2%
DISTANCE FROM AIRPORT	6.5%	6.0%
DISTANCE FROM HOME	22.3%	17.6%
SPECIES AVAILABLE	84.1%	86.3%
LIKELIHOOD OF KILL OR CATCH	54.8%	56.9%
QUALITY OF HUNTING AND FISHING LODGES	63.8%	77.2%
EXPERIENCE, KNOWLEDGE, AVAILABILITY OF GUIDES	80.0%	87.2%
REPUTATION OF AREA FOR HUNTING/FISHING	77.7%	75.5%
SCENERY	68.5%	68.6%
TIMING OF HUNTING/FISHING SEASON	64.3%	68.7%

Source: Consumer Research conducted as part of this study.

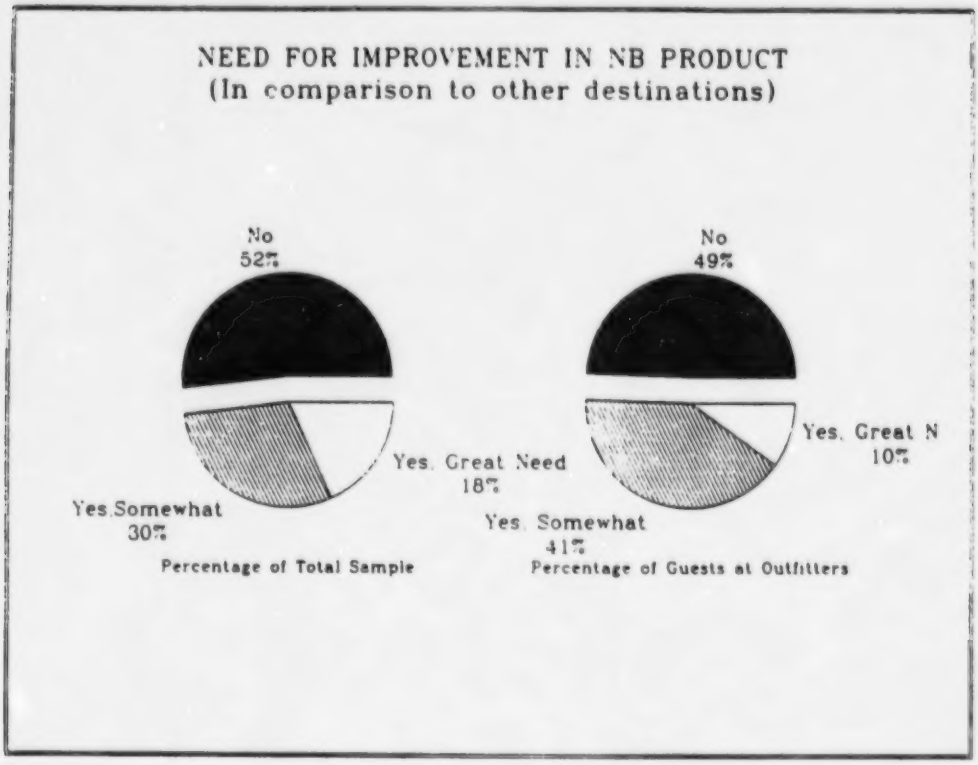
EXHIBIT II-3

HOW NEW BRUNSWICK COMPARES TO OTHER DESTINATIONS
(Percentage indicates New Brunswick compares well or very well)

	TOTAL SAMPLE	GUESTS AT OUTFITTERS
PRICE	53.6%	59.2%
DISTANCE FROM AIRPORT	31.3%	34.2%
DISTANCE FROM HOME	37.3%	38.6%
SPECIES AVAILABLE	63.7%	70.1%
QUALITY OF RESOURCES	72.0%	78.1%
LIKELIHOOD OF KILL/CATCH	58.1%	62.4%
OVERALL QUALITY OF FACILITIES	79.6%	82.8%
QUALITY OF ACCOMMODATION	83.4%	86.0%
QUALITY OF FOOD	80.5%	86.6%
QUALITY OF SERVICE	85.9%	89.2%
EXPERIENCE/KNOWLEDGE OF GUIDES	77.3%	81.5%
REPUTATION OF THE PROVINCE	75.0%	70.7%
SCENERY	73.6%	71.0%
TIMING OF SEASON	72.4%	70.0%

Source: Consumer Research conducted as part of this study.

Consumers were also asked to indicate their perception as to the need for improvements in the New Brunswick hunting and fishing product. The results of this question are illustrated below, indicating that roughly half of the total sample saw no need for improvement with 30% seeing somewhat of a need and 18% a great need. Guests of sports lodges were more likely to think that there was somewhat of a need for improvement (41%).



Respondents to the survey were asked to provide their comments on the types of improvements needed in New Brunswick's hunting and fishing product. These comments are summarized below, with the numbers indicating the number of responses received in each category.

- conflict with native fishing - 7
- want to keep at least one salmon - 8
- improved resource management including more poaching control - 6
- meeting problem with natives - 5
- problems with guides/don't want guides - 5
- want changes to or extended season - 5
- problems with salmon resource - 5
- problems with salmon water - 5
- problems with deer resource - 4
- clear cutting/spraying - 2
- more advertising needed - 2
- cost for license/too expensive - 2
- other - 11

Finally, consumers were asked for any general comments they might have about the province's hunting and fishing product. The comments received included:

- positive comments - friendly, excellent, doing a good job - 14
- positive comments about resource management - 2
- comments about problems with the deer resource - 4
- comments about problems with deer regulations or season - 6
- comments about problems with the salmon resource - 2
- negative comments about salmon regulations - 2

- concern over impact of clear cutting - 3
- more advertising needed - 3
- concern about guides - more training needed or people who own property should not require - 6
- problems with border crossing - 2
- concern over native fishing/hunting and impact on resource - 4
- seen as too expensive, particularly the license - 6
- other comments - 6

Perceptions of Product Wholesalers

Interviews were conducted with key travel wholesalers and agents selling hunting and fishing products in the U.S. and U.K. marketplaces. In total, eight interviews were conducted with wholesalers who currently sell New Brunswick's hunting and fishing product, and an additional three interviews with wholesalers who do not currently sell the New Brunswick product.

Exhibits II-4 and II-5 at the end of this appendix presents the results of these interviews.

Generally, the wholesalers who currently sell New Brunswick's hunting and fishing product are marginally satisfied with New Brunswick's outfitting product. Although almost all wholesalers have favourable opinions with respect to the quality of outfitters they represent and their level of service, there have been consistent concerns raised regarding the quality of the natural resource. Both deer and bear populations are perceived to be declining as a result of poor wildlife management practices and an outfitting industry too large to sustain the existing resources.

The wholesalers' perception of the quality of the Atlantic salmon resource varied considerably, however. The U.K. wholesalers and several U.S. agents feel the New Brunswick salmon resource is "good", while a few wholesalers thought it was "fair".

Two wholesalers feel the salmon resource is "poor". One of these, the largest

wholesaler representative of New Brunswick salmon strongly maintains that the Atlantic salmon resource is in fact being fatally threatened by the native gill-net fishery. The other wholesaler deleted New Brunswick's salmon from it's product line 3 year ago due to poor salmon catches.

In comparing New Brunswick to other competing destinations represented by the wholesalers, the province's competitive position was generally rated "average," with some feeling that the quality of New Brunswick's product has declined in recent years. Wholesalers that have been representing the New Brunswick product for a number of years have noticed increasing competition and conflict between outfitters and a decline in resource populations and game size (i.e., trophy animals).

In terms of the price of the New Brunswick hunting and fishing product, the perception among the wholesalers varied with an equal number perceiving the price to be reasonable/good and perceiving the price to be high. One wholesaler felt that New Brunswick's product is priced too low, maintaining that bear hunting is ⅓ cheaper than in comparable provinces. This wholesaler further commented that New Brunswick places too low a value on its wildlife.

Of the two wholesalers who do *not* sell New Brunswick's hunting and fishing product, one agent (Adventure Safaris Ltd, Illinois) was aware that New Brunswick offers some "excellent hunting and fishing possibilities" that could work well with the company's product offerings, and expressed a positive interest in selling New Brunswick in the future. The second wholesaler was completely unfamiliar with the New Brunswick product and would not speculate whether the province's product would sell in his market.

Market Trends as Reported by Wholesalers

In the U.S. market, demand for hunting and fishing is perceived by most of the wholesalers to be remaining stable, although sportsmen are tending to be more discerning in their travel decisions. With increasing access to hunting and fishing destinations around the world, (i.e., Russia's Kola Peninsula for Atlantic salmon fishing), sportsmen have more products to choose from and are thus comparing the quality of experience and value of several destinations to one another. Only one wholesaler felt that his market's (New England) interest in hunting and fishing has declined, largely as a result of a recessionary economy that encouraged sportsmen to take shorter hunting and fishing trips and remain closer to home.

Of the growth areas identified by the wholesalers, a growing interest in Atlantic

salmon was most often cited as a current market trend, for both the U.S. and U.K. markets. Other growth areas include the rising interest in primitive hunting methods such as archery and black powder, which offer a more challenging and rewarding hunting experience. Similarly, interest in baited black bear hunts is seen to be somewhat declining, primarily due to a perceived lack of challenge afforded to this method of hunting.

In the fishing sector, the sustainable method of hook-and-release angling is being received with varied response. U.K. wholesalers indicated that this method of angling was largely accepted among U.K. sportsmen, while its acceptance in the U.S. market varies somewhat in different regions and whether or not there is an option of keeping at least one fish.

In the U.K. market, Atlantic salmon appears to be primary product, with limited appeal for hunting (particularly bear).

In the New England market, interest in deer hunting is seen to have decreased, in part due to the local availability of this resource. However, trophy deer hunting is a popular sport with this market that stimulates hunting travel.

Conclusions

As indicated in the discussion above, consumer perceptions about New Brunswick's hunting and fishing product are mixed. The consumers of the product appear to be fairly satisfied with what New Brunswick has to offer although close to 50% believe that there is either some or a great need for improvement. The most problematic issues as far as the consumers are concerned appear to be the perceived conflict with native fishing and hunting, the quality of the resource, particularly the kill/catch rates and disagreements with some of the regulations in force in the province. The consumers are much more positive about the quality of the accommodations, food and services provided in the province.

To some extent, similar concerns are expressed by the product wholesalers. However, the wholesalers were much more negative about the declining quality of the resource and perceive an overall decline in the quality of New Brunswick's hunting and fishing product. Several wholesalers also expressed concern about the competition and conflict between outfitters and poor wildlife management practices.

While the consumer perceptions are generally positive, there are clearly some problems and market perceptions which need to be addressed. In some cases, the

issue seems to be more one of awareness than actuality (for example, major initiatives have recently been implemented to resolve the native gill net fishing problem). In other cases, such as declining resources, comments from outfitters as well as various actions taken by government agencies in the last year indicate that these are real problems.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
ESCAPE ACTIVITIES Lincolnshire, UK **Market Area:** UK **Products:** Hunting and Fishing in Canada -NB, Nfld, NS. **Competing Destinations:** Salmon - Nfld, NS.	Salmon is what is selling in UK market. The majority of the UK market are willing to participate in catch & release fishing. Company has advertised trout and bass fishing, and hunting for white-tailed deer, but these are not being sold. Are selling more Nfld. packages than NB due to NB's higher price ($100/day more expensive). Company is selling a small amount of hunting in Nfld. **Species:** Black bear hunting is not popular with the UK market. Bear's are thought of as teddy bears - something warm and cuddly that is not to be hunted.	**Outfitters:** Overall, good standard. Have had problems with one outfitter in the past but have stopped working with them. Facilities do not cater enough to women - more wardrobe space is required for example. Outfitters are slack in working with wholesalers. Feedback for enquiries is slow, and literature/rates for upcoming season packages are not timely. **Resources:** Atlantic salmon - good. Clients are quite happy. **Price:** Price is high. NB doesn't rate as high as Nfld. NB has less wilderness than Nfld.	UK market is aware of location of NS and Nfld, but not where NB is. Need to create awareness. UK markets like to take wives along on fishing trips. There is a lot of interest in spousal programs. There must be activities available for spouses (in addition to canoeing, photography, etc.). These guests are often visiting Canada for the first time and want to see the region. Outfitters should set up guides to escort spouses shopping, sightseeing, horseback riding, visiting Fredericton, etc. NB has a good variety of crafts which are also of great interest to the UK market. Some spouses will fish a day or two with husbands, but most are looking for other opportunities. UK market is very interested in catch statistics. Outfitters should provide this information in brochures etc. Target the UK market and generate awareness that NB is only 5.5 hrs away - can leave and fish the next day.	Should not have too many anglers fishing all in one pool. Biggest fight is against BC - the UK market thinks of BC when they think of Canada. **Sale of NB Packages:** Salmon is selling. No sales of hunting in NB. Poor salmon fishing in Scotland and Ireland in the last few years has fostered the perception that salmon are not abundant. NB must advertise actively for a few years in the UK market in order for them to "take you seriously." Most have not heard of NB. NB participated in the UK Game Fair this year - there is a large potential to increase the UK market for NB fishing. Outfitters need to have their promotional literature available sooner - the international market decides by Xmas where they will go on that summer. NB Outfitters should promote the actual size of the fishing pools in promotions - a fishing pool in the UK is perceived to be only a few yards wide.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
GO FISHING CANADA London, U.K. **Market Area:** UK, Canada, USA, Falklands **Products:** Fishing **Competing Destinations:** Salmon - Labrador, NS, Que	Hunting has limited appeal in the U.K. Market is also interested in trout, carp, and muskie. **Species:** Continued interest in salmon fishing - fishing in the UK has been poor during the last few years but very good this year.	NB offers a good product with private water and fish of a good size. Very desirable. **Outfitters:** Of those visited the standard is good All rooms should have private facilities.. Upgrading of outfitters would be useful. **Resources:** Fishing is good quality. **Price:** High - need to give the service to match the price.	Spouses often accompany fishermen to Canada. Do joint promotions with wholesalers/agents that sell their products.	Outfitters need to be more flexible to international visitors and understand their needs. They are paying a lot to come to Canada. **Sales of NB Packages:** 50 salmon packages in 1993. Hoping to increase this as company gets known.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
ANGLER ADVENTURES Old Lyme, Connecticut **Market Area:** Continental US, Canada, Europe **Products:** Fishing throughout the world. Canadian products - NB, Labrador, NS, BC, Que, Ont.	**Species:** Resurgence in interest in Atlantic salmon fishing in recent years. Anglers will endure great travel hardships to reach wilderness areas such as Quebec, Labrador, or Russia's Kola Peninsula to fish for Atlantic salmon.	Main interest is salmon. Have sent a few anglers to Eastern NB for smallmouth bass, although there is not a big market for travel for bass fishing. This past year customers experienced poor salmon returns. Many regular NB clients refuse to ever return to NB unless the native gill-net fishery is stopped. Clients are unwilling to continue paying in excess of $2000 for a *chance* of catching and releasing a salmon in NB. **Outfitters:** Excellent for lodges company represents - good food, good guides, good accommodations and friendly, hospitable people. **Resources:** Very poor - insufficient number of salmon.	NB's only real drawing card is Atlantic salmon. The US has comparable quality trout, landlocked salmon, shad, pickerel and bass fishing. These species will not stimulate fishing travel to NB.	Gill-net fishing by aboriginal people is completely uncontrolled and will ruin the salmon fishery. This fishing is occurring at the mouths of the Restigouche, the Saint John, and the Miramichi River. If this fishery continues, company will have no customers for NB since there will be no salmon. **Sales of NB Packages:** Main involvement in NB is for salmon on Restigouche, Nepisiguit, and Miramichi Rivers. 220-250 anglers annually. This may be nil if gill-netting is not stopped. Potential to boost NB salmon package sales if NB government quickly acts to close the gill-net fishery.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
UNTAMED WILDERNESS, Raymond, New Hampshire **Market Area:** New England **Products:** Hunting and Fishing. NB, Labrador, Nfld, Que, NY. **Competing Destinations:** Salmon - King salmon in New York. Brook Trout - Nfld (trophy) Black bear - NH, Que. Deer - NH	Market interest in hunting and fishing is down - no money, looking to stay closer to home, shorter stays, etc. Many New England hunters do not want to hunt with a guide. Most hunters want a trophy buck, but want the *option* of shooting a doe. Those hunters returning without a kill are dissatisfied. **Species:** Company primarily caters to deer hunters. Other species of interest to market include caribou (Nfld) and king salmon (NY). Baited bear hunts are losing their appeal. Interest is shifting away from rifles to hand guns (more challenging), although these are not permitted in Canada. Another growth area is archery and primitive weapons such as black powder.	Overall very satisfied with NB. **Outfitters:** Most are very good. Accommodations good. A few outfitters are very disappointing - incomplete cabins, misleading brochure, photos not of outfitters property, etc. Outfitter services have mostly been excellent. However, concerned about ethics of outfitters. Some do not care about ethics, which will kill the wildlife resource and ultimately the outfitters themselves. Also, outfitters are often unprofessional in their treatment of other outfitters. **Resources:** Some deer hunters dissatisfied - population too low. Interest in deer hunting in NB is declining. Salmon fishing has been good but not excellent. Salmon is OK on the Tobique River. Some perception in market that salmon population is low. **Price:** New Englanders are balking at spending $700-800 for a 5 day deer hunt when they can deer hunt in Maine cheaper ($600-700) for a 6 day hunt. Bear hunting is OK but a bit pricey.	Maine no longer has a spring bear hunt - an advantage for NB. People will go to NB for a Spring bear. Clientele are comparing deer hunting in NB to Quebec where a hunter can bag 2 deer in 4 days, even though the price is US$1400. Bear hunting in NB is better than in Que. Starting to see interest in spousal programs, although outfitters are remote and too far away from popular spousal activities such as shopping. Nature-related activities other than hunting and fishing are becoming popular. There is interest in coming to NB during the off-season to photograph wildlife, i.e., white-tailed deer. Outfitters should focus more on family-oriented activities during off-season, i.e. canoe tours of Miramichi River.	Have experienced problems with inappropriate information provided to clients i.e., wrong information re Canadian Customs regulations and procedures on importing fish/game. There are too many restrictions placed on non-resident hunters (i.e., guide requirement.) Would like to see female deer available for non-resident hunters (not just bucks), even on a small scale, or allocated through both-sex hunting on a given day, as is doge in New Hampshire. Industry needs to be self-policing. Some outfitters and guides are breaking laws, i.e., hunting deer at night. **Sales of NB Packages:** Company operates on a barter system, trading outfitter promotions for free hunting packages.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
PATHWAYS INTERNATIONAL Spartanburg, South Carolina **Market Area:** US, mostly eastern but some in western states. **Products:** International Hunting and Fishing. **Competing Destinations:** Atlantic salmon - Russia.	Market trends are for wing-shooting and freshwater fishing.	**Outfitters:** Those represented seem to run top quality operations that are definitely marketable. Good to excellent facilities and services. Some lodges need upkeep, although most seem to be working on this. **Resources:** Atlantic salmon - Company visited NB a little early in the 1993 season to catch the salmon runs, so unsure of status of resource. However, company heard that the fishing picked up later on. **Price:** Very reasonable.	Company plans to begin *promoting* Atlantic salmon fishing in NB in the spring of 1994. Feel that salmon fishing is experiencing a comeback due to the regulations being enforced with the commercial fishery. It is very costly for clients to go to Russia to fish for salmon and company feels it can be just as good and cheaper in NB. There is a potential for complementary markets to hunting and fishing - outdoor activities such as canoeing, photography, and bird watching are of interest to spouses and families. Additional facilities not likely required for these markets, but promotional strategies would need to be re-evaluated.	NB has received negative press over the Atlantic salmon fishing this year. There will have to be some attempt made to let the public know that the fishing is picking up. **Sales of NB Packages:** Low. Have not been promoting NB in quite a while. Future NB sales should increase in the next few years due to company development of a new brochure, ads, and articles.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
FISHING INTERNATIONAL Santa Rosa, California **Market Area:** US, France, UK, Spain, Italy. **Products:** International fishing - Baja, Mexico, Costa Rica, Alaska, Bahamas, Australia, New Zealand, Caribbean, Virgin Islands, Argentina, Belize, Chile, Columbia, Venezuela, Brazil, Panama, Russia, Europe, US, South Pacific, Africa. Canada - NB, BC, NWT, Sask, Man, Ont, NS. **Competing Destinations:** Atlantic salmon - Russia's Kola Peninsula, Iceland, Ireland, Norway. Russia & Iceland have generally better salmon fishing than NB. All, except Ireland, are more expensive.	Travelling anglers are looking for more "bang for the buck". The US economy has definitely affected where anglers are travelling and the dollars they are spending. No changes in demand for type of species sought. **Species:** Small market interest in smallmouth bass and white-tail deer; no market interest in black bear. Other species of interest to markets include tarpon, bonefish, trout, pacific salmon, steelhead.	**Outfitters:** For outfitters visited, excellent. All knowledgeable and friendly. Service excellent. **Resources:** Fair - fishing reportedly down on Miramichi due to low flow, but personal experience indicated it was quite good. Fishing closed on Saint John river due to poor salmon returns. **Price:** Good. Should remain the same and not increase in this economy.	The buying out of the Greenland nets should help Maritime fishing immensely. NB outfitters' service is comparable to its competing destinations. Service in Russia is not nearly as good. NB people are more friendly than any, more eager to help. NB absolutely magnificent in the fall when leaves are turning. Anglers enjoy bringing spouses on trips. Opportunities for photography, touring, shopping, and canoeing. Outfitters need to offer airport pickup, and be able to organize special spouse programs. They could be described in literature, priced, and pre-sold with rate dependent on number of people.	Marketing is an ongoing process. A good wholesaler/agent can accomplish a lot especially with some marketing funding assistance from the provincial government. Overall need more advertising dollars spent on directly promoting NB fishing. **Sales of NB Packages:** NB was new product for this company in 1993. Sent 16-20 people to NB this year. Sale of NB product expected to increase in future.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
WILDERNESS PURSUITS INTERNATIONAL Center Harbour, New Hampshire **Market Area:** New England primarily, although expanding south and west into Minnesota, Michigan, Chicago, New Jersey, Pennsylvania, South Carolina, Georgia, and Louisiana. **Products:** Hunting & Fishing in Canada. **Competing Destinations:** Salmon - Quebec, Newfoundland, Labrador, Nova Scotia. Bass - Nova Scotia. Black Bear - (Spring hunt - Nfld/Labdr). (Fall hunt - N.S., Que, BC, Man.) Deer - Alta, NS, Sask, Man.	Opportunities in Georgia, Michigan, and Massachusetts for big game such as moose and caribou. Archery is biggest growing hunting sport in the US. 65% of company's interest if for archery. Hunters are looking for more challenge and more rewarding experiences. **Species:** Interest in deer hunting has decreased since it is readily available nearby (particularly New England markets). Salmon not really popular right now, partly because company is targeting more to the south and west, which are big game hunting markets. Other species of interest include caribou, elk, mule deer, grizzly bear.	New Brunswick rates average when compared to its competing destinations. Several products are equal or better (i.e. deer, bear) in other areas. NB product perceived to be going down in quality in general. The interest is not there for NB that used to exist 5 yrs ago. Some clients say they will never return to NB. **Outfitters:** Good to excellent of those company represents. However, has heard horror stories about outfitter accommodations and practices in the province. Lots of negative perception in marketplace regarding outfitters. **Resources:** Scarce. Fair to good for fishing. Poor to fair for hunting - a lack of game (bear, deer). **Price:** Selling price of animals is too cheap - not enough value placed on animals. NB is selling ⅓ cheaper than comparable provinces.	Expose products farther west and south. Georgia would be good for trophy deer. Texas is another large hunting market. Problem of public perception and lack of awareness. NB has the same products many other areas have - NB needs lots of promotion and *positive* word-of-mouth publicity. Put more value on animals and increase price - bring in fewer people for higher price. Salmon fishing combined with archery for deer or bird. NB outfitting industry should stop focusing so much marketing efforts in New England area. Too many NB outfitters attending sporting shows and undercutting each other. Some but limited interest in spousal programs.	Need better wildlife management. Dual bear hunt is decreasing size of animals available. Establish an outfitters licensing requirement and promote this to markets. Outfitter license should evaluate: •cleanliness •comfort of facilities •equipment advertised is available •quality of food •adequate care of game Quality control is necessary. Enforce through revoking of license to operate. Guides should be trained. Need for a mandatory guide training course in order to be licensed. Outfitters should also be trained. **Sales of NB Packages:** Not many - 6-8 in 1993. Has been 15-18 in past years.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
SEASONS INTERNATIONAL Exeter, New Hampshire **Market Area:** US, Canada, International **Products:** Hunting and Fishing. **Competing Destinations:** Atlantic salmon - Iceland, Russia, NS, Labrador, Sask, Alta, Manitoba, some Que.	Current market trends are remaining stable. **Species:** There is more interest in salmon angling, and a little more interest in bass.	NB compares to its competitors at an average rating. **Outfitters:** Good. **Resources:** Salmon - resource is good, although difficult to get a good catch. Hunting - great decline in sending people to NB due to low deer population. Black bear population is also declining. **Price:** Overall reasonable. Some a bit expensive for what they offer.	NB is easy to get to for the east coast - this is a strength. Company only sells hunting and fishing component - not interested in other aspects such as complementary markets. Industry wide lure brochure should show photos of all outfitters, and indicate season, location, etc. Distribute these at sportsmen shows. This brochure could provide an overview of areas & outfitters. Don't have just a listing - give one page per outfitter for colour photo, info, etc.	The interest is there for hunting but there are too many outfitters in NB who don't know much about what they're doing - they are depleting the resources. Also the high number of outfitters are depleting the resources. Need fewer number of outfitters - NB government can better support a fewer number - concentrate on well-established outfitters. More regulation is required by government. Need better wildlife management as resources are depleting. **Sales of NB Packages:** A few. Potential for more sales in future of Atlantic salmon. Potential for hunting depends upon the resource.

EXHIBIT II-4
WHOLESALERS SELLING NEW BRUNSWICK

WHOLESALER/AGENT	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT		
		PERCEPTION OF PRODUCT	OPPORTUNITIES	COMMENTS
ROD and REEL Adventures Modesto, California **Market Area:** The U.S. and Canada via travel agents. **Product:** Fishing throughout the world. Canadian products: BC - Salmon Alta - Trout NWT - Lake Trout Ont - Walleye, Smallmouth Bass Que - Brook Trout	Interest in Atlantic Salmon is peaking due to the widespread publicity of salmon fishing in Russia. U.S. anglers are tending to choose warm-water fishing such as in Cost Rica, the Amazon, etc. Other fishing species of interest to market include trout, walleye, and smallmouth bass. The southern species targeted include tuna, tarpon, dorado, and sailfish.	Rod & Reel Adventures has sold New Brunswick Altantic salmon in the past, and experienced success 8-9 years ago. However, this company has not offered NB product in 3 years due to a perceived low salmon yield. New Brunsick's salmon would probably not even rate when compared to other salmon destinations the company represents. Although Rod and Reel Adventures has no current data on salmon catch rates, the company's latest data indicated angling effort at 0.5 - 1.5 fish per rod-day. These catch rates are too low to stimulate angling travel to New Brunswick. **Outfitters:** Previously this company represented one lodge in NB and was completely satisfied with its quality and service. **Resource:** Atlantic Salmon are scarce.	Should the salmon population increase, this company is definitely interested in re-introducting New Brunswick salmon product to its product line. There is more and more interest every year to bring spouses along on fishing trips, both for angler and non-angler spouses. The types of activities this market is interested in varies from year to year. Canadian lodges are hesitant to publish or advertise catch rates. If the salmon resource is favourable, this is an excellent selling feature both to wholesalers and to clients. Would like to see outfitter brochures which highlight their recent catch rates.	New Brunswick's salmon fishing is tough to sell in light of better angling success in other destinations such as Russia. In Russia, catch effort is some 15-25 fish per rod-day. However, the Russian salmon product is much more expensive, from US$4,500 - 8,000 for a 10 day trip (2 nights Moscow, 7 days angling including air fare & daily helicopter transportation to fishing sites). New Brunswick does offer better outfitting facilities than Russia, however, although anglers will tolerate this in Russia due to the high catch rates. New Brunswick has the opportunity to take advantage of the increased interest in Atlantic Salmon, spurred largely by the boon in Russia's untapped salmon resource. Anglers who become interested in salmon, but who may not afford Russia's high price, may opt for a salmon trip to a closer destination such as New Brunswick. **Sales of NB Packages:** None: NB salmon product was dropped. NB not sold in 3 years.

EXHIBIT II-5

WHOLESALERS NOT SELLING NEW BRUNSWICK

	HUNTING AND FISHING MARKET TRENDS	NEW BRUNSWICK PRODUCT	
		PERCEPTION OF PRODUCT	OPPORTUNITIES
ADVENTURE SAFARIS LTD. Chicago, Illinois **Market Area:** World **Products:** Hunting and Fishing sporting trips in Africa, Europe, South & Central America, New Zealand, Australia, and Canada (Manitoba, Alberta, B.C., Quebec, Ontario). Cater to rifle shotgun, bow, and black powder hunters.	Many Europeans like to hunt and fish Canada. No change in demand. If the economy picks up, the future for hunting and fishing trips in the future will be bright. Sportsmen are active and can only put off a trip for so long. Some families go hunting together, but most fishing and hunting is primarily 2 to 3 men or more hunting together, or father & son, or husband & wife. There seems to be a never ending supply of clients who want to experience the outdoors in quality settings providing first class sport.	Have not seen New Brunswick product first hand but is aware that the province offers some excellent hunting and fishing possibilities that could work well with company's product offerings. Interested in visiting New Brunswick to experience outfitters and products first hand. Feels there is a potential to sell New Brunswick to company's clientele.	Interested in marketing and selling New Brunswick in the future. Interested in: Hunting - black bear, deer, upland game, waterfowl. Fishing - smallmouth bass, brook trout, salmon. Company could market New Brunswick through direct mailings to client list, as well as advertisements in outdoor magazines such as Safari, Sporting Classics, etc.
ANGLERS TRAVEL CONNECTIONS Reno, Nevada **Market Area:** **Products:** Fishing: Alaska - salmon, trout Baja - marlin, dorado, tuna Costa Rica - marlin, dorado, tuna, sailfish New Zealand - trout Argentina - trout Chile - trout Belize - bonefish Canada - BC (salmon, trout), Sask.	No change in market trends - status quo.	Not familiar with the NB product.	Unsure if there is an opportunity to sell NB fishing in marketplace.

APPENDIX III

THE RESOURCES

APPENDIX III

THE RESOURCES

An overview of the resources available to New Brunswick's outfitting sector is presented in this section of the appendices report under three headings - Sport Fishing Resources, Hunting Resources and Soft Adventure Resources.

EXPLOITABLE FISH RESOURCES

Anadromous Atlantic Salmon:

This fish is the most highly sought after fish by non-resident anglers in the province of New Brunswick. New Brunswick is the home to many of the most famous Atlantic salmon rivers in the world including the Saint John, Miramichi, Restigouche and the Tobique.

Sea run salmon are available in virtually all New Brunswick watersheds. (See Figure III-1.) The headwater sections of a few drainages are unable to be penetrated by salmon because of impassable natural or manmade barriers. Significant sections which currently do not produce salmon are:

- the Saint John River upstream of Grand Falls and upstream of the Tinker dam on the Aroostook
- the East Branch of the Nackawick stream upstream of an old mill dam at Pinder
- the Charlo River upstream of the Charlo Reservoir
- the Tetagouche River upstream of Tetagouche Falls
- the Nepisiguit River upstream of Nepisiguit Falls
- the Southeast Upsalquitch River upstream of the falls at Simpsons Field
- several minor Fundy drainages

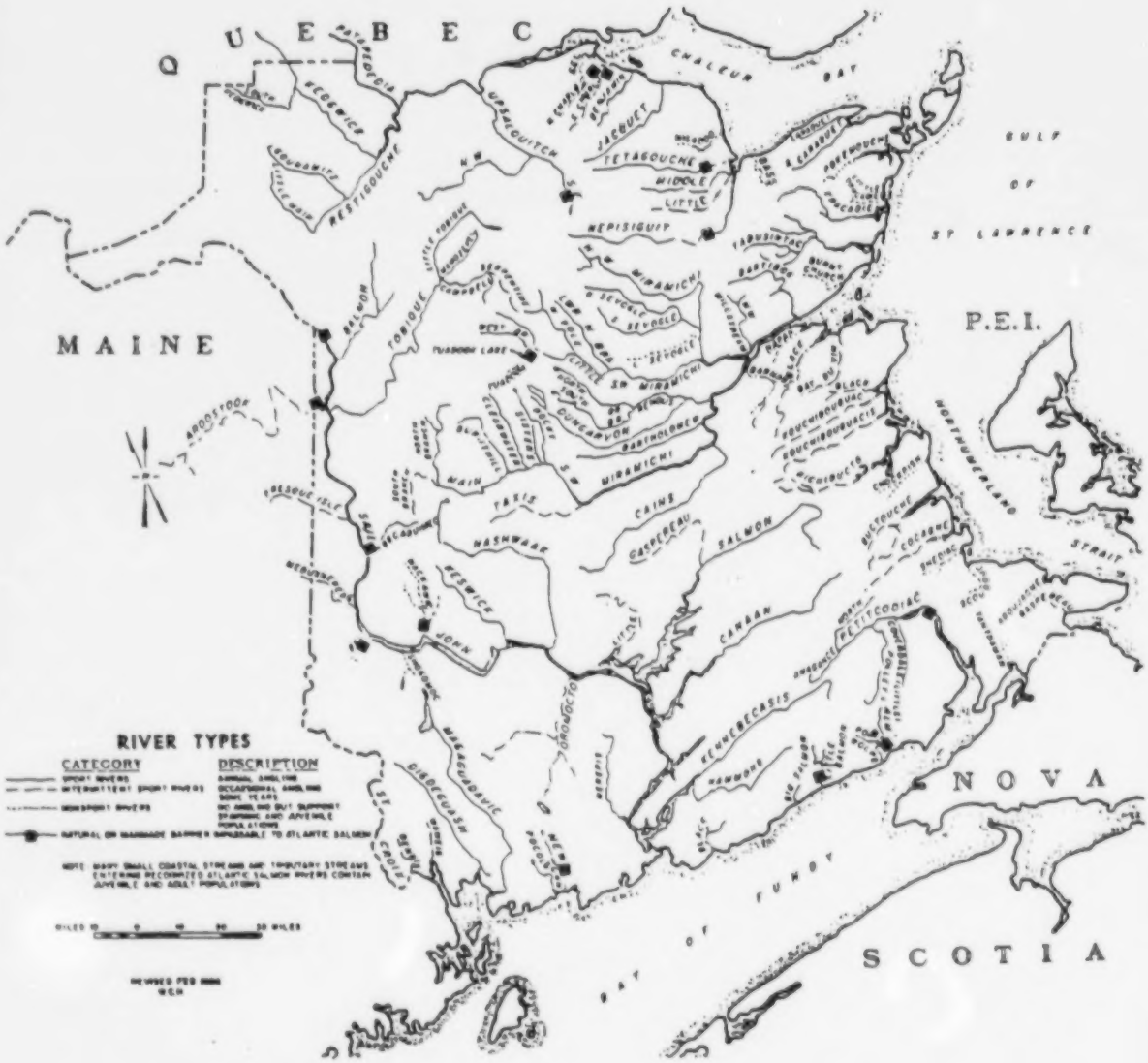


FIGURE III-1

ATLANTIC SALMON
RIVERS in N.B.

As well, salmon access to upstream reaches as been seriously hindered by man-made structures on the Magaguadavic, Petitcodiac and St. Croix Rivers. Virtually all other New Brunswick rivers provide spawning and nursery habitat for salmon into the extreme headwater sections where low flows and beaver dams may restrict access.

Figure III-1 shows the extent of the salmon production and migration area of NB rivers as well as the areas where salmon production or migration is restricted by barriers. At some point during the open water year, it is therefore possible that an angler could conceivably catch a salmon at any point on Figure III-1 that is indicated as being accessible to Atlantic salmon. The probabilities of this happening in many sections is of course minute, and as such the opportunities for conducting a successful outfitting business for salmon on these stretches are non-existent.

Restrictions to successful angling, and therefore outfitting because of resource availability can occur for three main reasons:

No Resource:

Areas which are inaccessible to salmon could be made accessible by constructing fishways or through trap and trucking operations. Alternatively, they could be seeded with juvenile salmon from a suitable donor source to produce more smolts. The area upstream of Grand Falls and the Upper Nepisiguit provide the best opportunities in the province for range extension of Atlantic Salmon, with the Nepisiguit providing the better opportunity. Some of the strategies described above have been used in these locations.

Resource Present in Insufficient Quantity:

Many of the streams and stream sections indicated in Figure III-1 as being accessible to Atlantic salmon do not have a large enough "critical mass" of adult salmon present during the open angling season to be considered salmon angling water of acceptable quality. It has been shown that catch per rod-day values of less than 0.2 are unacceptable to most anglers (1986 Recfish Proceedings). This may be due to habitat factors such as low gradient resulting in less than optimal juvenile habitat quality in riffle sections.

Another reason for unacceptable catch per unit effort rates is linked to the timing of the salmon spawning runs. Salmon are often available in certain stream sections for only a portion of the season. There are a variety of reasons for a

"critical mass" of salmon being available or unavailable in different stream types.

Additional data on the current status of salmon angling water in New Brunswick, and when it is of acceptable angling quality was presented in the interim report.

It is difficult to alter the timing of a wild salmon run. The reason for the delayed arrival of fish to upper reaches of streams and into small tributaries is that there is little "holding" water in these stream reaches. Cold, well oxygenated water may also be deficient.

A method of increasing the duration of acceptable angling quality in these sections would be to increase the magnitude of the overall run. In this way the strength of the early run might increase proportionally. Increasing the total run is currently an objective of fisheries management agencies such as DFO and the New Brunswick Department of Natural Resources and Energy (NBDNRE). Their prime tools are conservation and protection (C&P), habitat protection and improvement and hatchery stocking. Selection of the early run in these areas for obtaining hatchery brood stock might also result in an augmented early run stock.

Current Resource Strength and Projections for 1994:

During the preparation of this report, on September 15, 1993, the sport fishery for Atlantic salmon on the Saint John River system was closed due to a lack of resource availability. Approximately 2,600 large salmon had been counted at the fish collection facilities at the Mactaquac Dam by this time while there is a spawning escapement of 4,400 large fish required to completely populate the upper Saint John system. There are prospects for only several hundred more fish for the remainder of the year, and the current projections are for 2,900 large fish. To conserve them, the sport fishery was closed. Other rivers such as the Magaguadavic in the southwestern region of the Province were closed for the same reason of insufficient large spawners. This was partially a political move in that the closing of the native food fishery at Tobique required that the sport fishery be closed also.

Projections for the resource in 1994 are for between 1,500 and 3,500 large spawners to Mactaquac. Scenarios for management will be examined at a zone management meeting in November. Included for discussion will be a proposal for a complete closure at the first of the year with a decision for reopening based on achieving a certain return level by a certain date. Other proposals expected for consideration include the selection of all or a portion of the large salmon at the Mactaquac collection facilities and their placement in the barrier pool on the upper

Tobique.

A question which must be asked about the Saint John system is that required spawning escapement has been reached only twice in the last twelve years. Therefore, why was the system closed to angling only this year?

On the Miramichi, spawning escapements were met in all portions of the system in 1992. An estimated 50,000 salmon survived to spawn in 1992, and angler catch was 40,000 grilse. The runs in 1993, although lower than in 1992 appeared healthy. Native bands are now using trap nets, harvest only grilse, and appear to be adhering to agreed limits on catch. It is not anticipated that there will be a closure similar to that on the Saint John implemented on the Miramichi.

The Restigouche adult salmon population is monitored by angler catch at four sporting camps and at the Upsalquitch barrier pool. Large salmon were down from last year and from the five year mean by 50% this year. The grilse run was average. The run arrived at the Restigouche approximately three weeks late in 1993, and native netting on the Quebec side of the river was heavy.

It is not known whether there will be a closure on the Restigouche in 1994, but it appears unlikely for political reasons.

Special Angling Rights/Regulations

A third reason that salmon in otherwise suitable fishing water might not be available, is because of special angling rights or regulations which may apply on certain waters. Fishing in river section where the adjacent property has so-called "riparian rights", those on waters where Crown lease regulations apply, and those in Crown Reserve stretches of water are available only to the controllers of these waters. Riparian owners and Crown lease holders can permit others to fish their waters, but Crown Reserve stretches are open only to specific individuals who apply for rights to fish and who are successful in a lottery draw.

Riparian water can be, and often is, used by outfitters in their Atlantic salmon outfitting business. However, much riparian water is controlled by owners who for much of the season, may not use the water. It is therefore not available for outfitters or the general public for the generation of angling benefits. The rights to Crown lease water cannot be sold unless the process is approved by the Minister of Natural Resources and Energy, and is also, therefore, not available for outfitting. Crown Reserve water is not transferable.

Other stream sections which in many cases are unavailable for angling are the headwater spawning areas. The headwaters of many streams are designated as areas where angling is not permitted in order to provide sanctuary to salmon that have reached their spawning grounds. There are also stream reaches upstream of Provincially-operated barrier fences where fishing quality is poor due to a lack of resource.

Opportunities for outfitters through mitigation of these restrictions include the possibility of arranging for outfitters to lease rights to riparian-controlled water from the owners. Also, the status of the Crown leases is reviewed every ten years. The last review occurred in 1990, and it was decided to renew the leases for auction to the highest bidder. There are potential opportunities for outfitting if, in the next review, fees could be charged for fishing on these waters. A coalition of outfitters might then bid for control of these highly productive stream sections. On the Restigouche leases there may be opportunity for outfitting during the month of August when many of the lessees do not fish. It is very unlikely that a change in the status of the Crown Reserves would be considered, and there is currently considerable pressure to create new Crown Reserves from the Crown lease water, and the Crown open waters.

Season closures also restrict angling opportunities on river sections in New Brunswick

The current seasonal restrictions are designed to protect salmon immediately prior to and during their spawning season. A secondary reason for season closures for salmon may be to prevent egg mortality due to anglers walking on redds and crushing eggs in the gravel. The necessity of season closures is questionable. License restrictions do not allow anglers to kill salmon (fish greater than 63 cm in fork length) in New Brunswick waters. Only grilse may be retained, and salmon must be released alive if hooked. This regulation is designed to protect female fish, the vast majority of which are greater than 63 cm in length when they are in the fishery. The grilse of most New Brunswick stocks are to a large extent male. Female grilse spawn very few eggs when compared with female salmon. Therefore, conservation appears to be adequately addressed by this grilse-only kill regulation.

Opportunities for extending the salmon season are discussed in the main report.

Nature of the Salmon Run

Another restriction on salmon availability to anglers, and therefore a restriction on

outfitting opportunity, is the nature of the salmon run in many rivers such as the Miramichi and interaction with the techniques of salmon fishing. In the warm, low water periods during the summer, which of course may be of extended duration, salmon tend to congregate in large deep pools which receive cool flow from a smaller feeder stream. Hundreds of fish often occupy these so-called "holding" pools. These pools provide limited angling opportunity. Many are within riparian-controlled zones, and often the pools are closed by variation order to prevent poaching.

These pools may also be of poor quality for angling. Salmon fishing in New Brunswick is conducted by fly-fishing only. This technique is difficult to master, and salmon harvest is restricted due to the expertise that is required.

To increase angling opportunity, it might be possible to entice fish out of holding water. Many river sections are wide shallow and the water surface is flat. Narrowing the river in these sections would impart more flow to the water creating runs which scour gravel and create deeper water, so-called "resting" pools. Several salmon or grilse may occupy small "runs", and it is this type of water which provide the most angling success. If cool groundwater could be directed to these runs, more fish would be held and tremendous angling opportunity would be created. By giving outfitters the opportunity to create runs of this nature, they would be provided with exclusive rights to excellent angling water which did not formerly exist. This would alleviate pressure on Crown open pools, and eliminate the disagreements which can result between outfitters and local resident anglers. This method has been employed successfully to improve salmon angling water on several stretches of water in the Province including Camp Harmony at the mouth of the Upsalquitch River.

The need for an evenly spread fishing pressure speaks again to the nature of salmon fishing. Pools that receive constant fishing pressure during the day often produce very poor catch per effort rates because the salmon lose their urge to take a fly. Usually it is during the first or second time that an angler fishes through a pool that will produce a strike, particularly in small pools where the entire water is covered. This is the reason that private water is so valuable. The sportsman that fishes a private pool knows that he is often the first person to do so during the day or at least that angling pressure has not been so great that there is little possibility of catching a fish. A program to create more angling water will result in a more even distribution of fishing pressure within a length of stream, a greater number of satisfactory fishing experiences, and more economic return from the salmon resource. Again, conservation concerns are addressed by grilse-only kill regulations.

Such a program will require DFO to change its policy regarding pool creation and improvement.

The Black Salmon Fishery

Black salmon are an underexploited resource with great potential for sport fishery marketing by outfitters. The strength of this fishery is that it can be very high yielding, with the potential for many fish to be caught per rod day. The fish are hungry and actively feeding after spending a winter under the ice of their spawning streams. They readily take streamer flys when water turbidity levels are low enough that the fish can see them. However, when water levels are very high and rising, the water can be muddy and success rates fall. Black salmon are distributed evenly within the lower flat water sections of the Tobique, Nashwaak, Miramichi and Restigouche, therefore exclusive angling rights are seldom exercised by riparian owners. The season is short, lasting from ice-out until early-to-mid-May. However, due to the fact that the fishery maintains its high quality even under conditions of very high angling pressure (unlike the fishery for bright salmon), there is tremendous potential for the promotion of the fishery.

A perception has been spread among angling organizations and in the popular print media that the black salmon is not a robust game fish. This is, however, untrue. The hooking rate for black salmon is much higher than that for bright salmon, particularly for large fish. Black salmon also fight nearly as hard as d bright fish with help from the high flow spring freshet conditions which exist during the period of the fishery. In early May when they have started to feed on smelt they gain an additional energy boost. To combat the negative perception, a move has been initiated to refer to these fish as "spring" salmon instead of black salmon.

Native Gill Netting, Atlantic Salmon

The issue of native gill netting of atlantic salmon is a contentious one and one that is clearly of concern to consumers and wholesalers as well as to outfitters.

However, agreements will be in-place in 1994 which will reduce gill netting by aboriginal groups. This type of killing of salmon is very dangerous in that it does not discriminate between large salmon which, as mentioned previously, are largely female. Instead, trap nets will be used to target grilse and allow the live release of large fish. It is anticipated that within the next few years, there will be no gill netting of Atlantic salmon by native groups (F. Ring, DFO Gulf Region Industry Services and Aboriginal Fisheries, personal communication).

Landlocked Atlantic Salmon

Landlocked Atlantic salmon (landlocked salmon) are taxonomically indistinguishable from anadromous (sea run) salmon. However, instead of using the ocean as a foraging area, these fish use lakes where they feed primarily on another landlocked anadromous species the rainbow smelt. Landlocked salmon spawn in the inlet or outlets to many of the large and intermediate sized lakes of the Province, however many of these inlet streams do not provide sufficient nursery area to produce an exploitable population of salmon. Therefore, the fishery for this species, in most cases, relies on the maintenance stocking of hatchery smolts to supplement wild production. In fact many, if not all, of the landlocked salmon populations of New Brunswick lakes were introduced by man.

The fishery for landlocked salmon in New Brunswick occurs mainly in the lakes. The success rate for landlocked salmon fishing is generally not as high as that for brook trout fishing.

However, the experience of catching landlocked salmon is usually thought to be more exciting than that of trout because of their relative size, and because of the salmon's leaping behaviour after it is hooked. The relatively low abundance of landlocked salmon necessitates enforcement of conservatively low daily limits. Enforcing a 16 inch rather than a 14 inch minimum length limit would further improve stock conservation. Conservation is not designed necessarily to maintain the spawning stock, because landlocked salmon populations are generally dependent on hatchery introductions, but to conserve enough fish in the fishery to maintain an acceptable daily catch rate.

Figure III-2 shows the lakes in the Province where landlocked salmon exist. The lake with the greatest potential for landlocked salmon production which has not yet been fully developed is Grand Lake. Small pilot-scale introductions have produced excellent catches of salmon. At an annual stocking rate of one smolt per acre every year for the first six years, the annual hatchery production for this lake alone would require all of the current annual production of the Provincial hatchery system. Full development of the landlocked salmon fishery in Grand Lake would produce an annual catch of approximately 15,000 fish and generate 25,000 to 35,000 angler-days of effort, many of which might be available for outfitting opportunity.

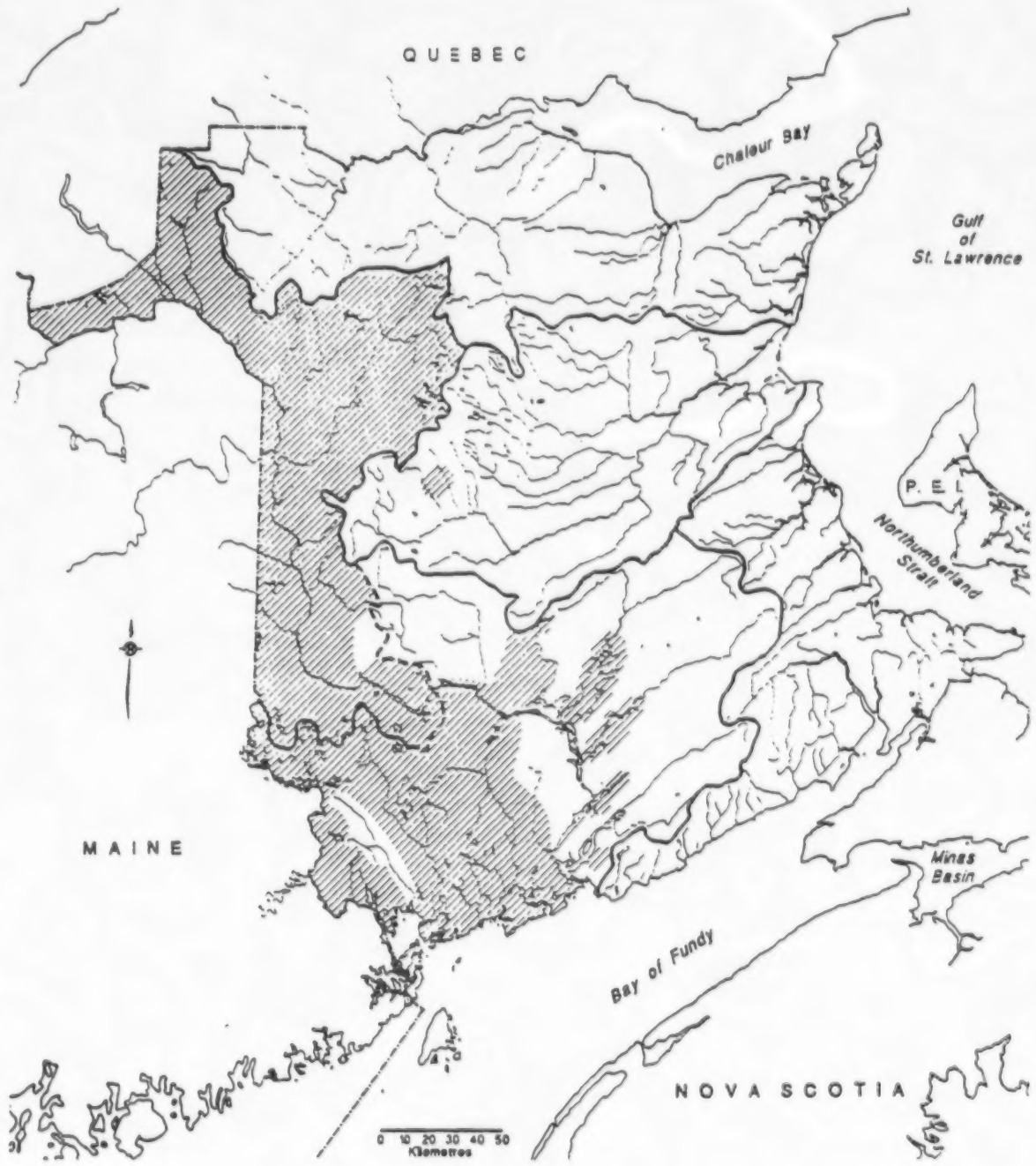


FIGURE III-2

DISTRIBUTION of LANDLOCKED ATLANTIC SALMON in N.B.

Landlocked salmon fishing is at its best in the spring. There may be an opportunity for black salmon outfitters to sell opportunities to catch landlocked salmon when black salmon angling is poor because of turbid water conditions. These conditions, of course, do not exist in the lake environment.

Brook Trout

Brook trout are generalists in that they can occupy a wide variety of habitat in the freshwater and even marine environments of the Province. They reside in swift flowing, rocky streams, mud-bottomed deadwaters, deep, rocky oligotrophic lakes, and shallow, homoiothermic, eutrophic lakes and ponds. In addition there are stocks of anadromous brook trout (sea trout) which use the estuaries and near-shore marine waters of the Province as foraging grounds and freshwater streams for spawning and nursery purposes. Brook trout inhabit virtually every watershed in the Province. However insufficient numbers or small individual size precludes the existence of significant fisheries for the species over much of its range. Addressing the causes for these factors may allow the population to flourish and create opportunity for productive fisheries, and therefore outfitting opportunities.

Brook trout are the most commonly angled species in the Province of New Brunswick by residents. They are captured in waters that are not scheduled as fly fishing only by bait and spin cast fishermen using lures, as well as by fly fishing. Fly fishing only waters were created to protect Atlantic salmon stocks, but also offer the opportunity to catch brook trout.

Provincial length and creel limit regulations, which until recently have been far too liberal, have allowed excessive kill by anglers. This has caused fish to be cropped at a young age and standing crops to be severely depleted. The forestry industry has opened vast regions of the Province to access by anglers which has allowed brook trout stock depletion to extend beyond the near-urban areas.

Successful outfitting using brook trout as a resource requires the fishing to be rather predictable, and fish size to be fairly large (0.5 kg or more). Such opportunities are available in a number of the lakes of the Province. Trout can exist in headwater lakes because, unlike salmon, they can successfully spawn in shoreline groundwater seeps. The deep water of lakes provides significant areas where large trout can exist. Often trout of the same age are significantly larger in lakes than they are in streams.

However, trout in lakes are also very sensitive to competition from other species, particularly from yellow perch, eels and white and long nose suckers. There are,

however, significant opportunities for the creation of excellent fisheries in headwater lakes through reclamation using fish toxicants to eliminate competition.

Other factors limiting trout standing crops in lakes are infertility and overfishing. Fertilization can be combined with the following management activities if needed:

- stocking programs if natural spawning capacity is insufficient;
- the introduction of a large forage species such as gammarus to meet the food needs of very large trout; and
- the establishment of low creel census and desirable length limits to manipulate the numbers and size of fish killed;

In many cases, trout standing crops in autumn of 50 kg/ ha can be created. If enough lake area were available for exclusive access, very successful outfitting opportunities could be created using brook trout as the primary target species. If the lakes were placed under the exclusive control of an outfitter, there would also be opportunity for extending the season for a month or more beyond the current seasonal closing date of September 15.

Exhibit III-1 lists lakes where current brook trout populations are strong enough to support significant angling opportunity. Exhibit III-2 gives a short list of lakes which may benefit from management interventions described. It is conceivable that these and other similar lakes, which currently provide only marginal trout fishing opportunity, might be made available for outfitting if there is a serious desire to commercialize the New Brunswick sportfishing industry.

Sea Trout

As mentioned previously, sea trout are anadromous brook trout. They are genetically distinct from resident trout, and are often much larger than resident fish of the same age. Sea trout in small coastal watersheds move freely between fresh and salt water. However, in major watersheds such as the Miramichi they migrate to headwater reaches in May, June and early July. Different stocks of sea trout are known to pass a different stretch of river at very similar times each year. Because of their migratory and schooling nature, successful angling for sea trout can be transitory. It would be difficult to base an outfitting operation solely on sea trout because of this fact. The only exception might occur if total control of a section of stream in which sea trout remained until spawning season could be

EXHIBIT III-1

NEW BRUNSWICK LAKES WITH POTENTIAL FOR OUTFITTING OPERATIONS FOR BROOK TROUT

LAKE OR LAKE GROUP	COMMENTS
Upsalquitch Lake, Northumberland Co.	Tremendous trout population, but stunted individuals. Needs more exploitation.
McDougall Lake, Restigouche Co.	Tremendous trout population, but stunted individuals. Needs more exploitation.
Canadian Pacific Lakes near Boiestown. One example: Sisters Lakes	Not used extensively by C.P. May be willing to lease
Irving lakes in south of Province especially Duck Lake	Irving generally does not lease waterbodies, but southern lakes may be exceptions
Fraser freehold lakes	This could be an excellent opportunity. Natives are currently negotiating for two lakes.
Northwest Miramichi lakes, Kenny, Goodwin, First and Second	These lakes have excellent populations of trout especially Kenny and Goodwin.
Clearwater Lake, Sevogle drainage.	
Logan Lake, LSW Miramichi drainage	
Mains Lake, Miramichi near Plaster Rock-Renous Highway	Very productive and well known NB trout lake
Bayshore lakes near Fundy Park border such as Livingstone, Square, Blackwood, Stangard, Priest, Richardson	Very productive lakes. Some private, some Crown.
Pejebscot Paper Company Lakes (eg.) Walton, Theobold, Duffield, Grassy, Dicks, Elbow, McFadden	The Hearst Corp. is attempting to sell this freehold. A deal might be worked to leae these lakes in the interim. Some lakes may need intensive management.
Mullin Stream Lake, Sevogle drainage	

EXHIBIT III-2

LAKES REQUIRING RESTRICTIVE ANGLING REGULATIONS AND/OR APPLICATION OF SPECIFIC FISHERY MANAGEMENT RESTORATION TECHNIQUES TO SUSTAIN ADEQUATE SURPLUSES OF WILD TROUT FOR ANGLING

DNRE MANAGEMENT REGION				
1 Bathurst Region	**2 Newcastle Region**	**3 Hampton Region**	**4 Fredericton Region**	**5 Edmundston Region**
Beaver	Peabody	Mechanics	Seven Mile	Blind
Muddy	Clear	Parks	East Long	Caron
Roger	Sinclair	Richie	Bonapart	Quisibis
Lowells	Big Hole Brook	Folly	S. Oromocto	Thompson
Knoll Spruce	Devil's Back	Silver	Chamcook	Roulston
N. Little River	Catamaran	Bennett	Becaguimic	Tomlison
North Branch	Island	Bruin	Oromond	Wild Goose
Belledune	Kenny	Chambers	Adalaide	Riley Brook
California	Louis	Fenton	Grassey	Seigas
First Nepisiguit	Mains	Four Mile*	La Coute	Sisson
Popelogan	McKendric	Loch Lomond	Greenhill	
Murry	Nowlan	Lockhart		
8-Mile	Sears	Milligan		
Antinouri	Valentine			
Charlo Dam	Day Brook			
Island	Peaked Mtn. Lks			
Tongue	Harris Lake*			
Indian				
Ackroyd				

Note: This exhibit is a list of lakes which could be intensively managed to produce very good brook trout fishing. The Province is currently finalizing a policy whereby Crown lakes will be available for lease to outfitters. Some of the lakes in the preceding tables are private. However, many are Crown-owned, and offer excellent potential for the development of brook trout fisheries of superior quality.

obtained. Even then, very stringent regulations to control kill would have to be enforced.

There may be an opportunity for the release of the Lower North Branch of the Little Southwest Miramichi Berry Brook stretch for outfitter use. This stretch which is currently designated for hook-and-release angling is currently underutilized. It would provide for limited sea trout kill and grilse take.

Wild sea trout, in most cases, are probably best considered as a minor additional by-catch species supplementing the Atlantic salmon fishery. There are opportunities for using sea trout in a stocking program to produce angling benefits.

Smallmouth Bass

The smallmouth bass is an increasingly popular gamefish in New Brunswick. Its range in New Brunswick is restricted to the large lakes, reservoirs, and major tributaries of the Saint Croix and Saint John River (downstream of Grand Falls) systems in the western part of the Province (see Figure III-3).

New Brunswick is near the northern range limit for smallmouth bass in North America. The bass are of moderate size in comparison with those from warmer areas such as the states near the Mason-Dixon line. Virtually all New Brunswick lakes could stand more angling pressure with no significant drop in angling quality (Peter Cronin, NBDNRE, personal communication).

Smallmouth bass could provide additional angling benefits if their range were increased through introduction to suitable habitat. This area would include the larger lakes of the Province which do not presently contain bass populations. However, because of the habitat-type overlap with native brook trout populations, any introduction should be carefully considered.

Another intervention which may improve the strength of the bass resource would be to implement regulations during the spawning and brood caring season, which in New Brunswick has been defined as lasting from May 24 to July 1.

Most legal-sized bass in New Brunswick are released alive. Therefore, the major selling points for New Brunswick bass fishing are a very good catch per unit effort ratio, and a secluded wilderness experience in comparison with fishing in areas such as the southern US where bass is the preferred species of the resident anglers.

FIGURE III-3

DISTRIBUTION of SMALLMOUTH BASS in N.B.

Striped Bass

The striped bass is an anadromous species which makes feeding or spawning forays into many New Brunswick coastal rivers and estuaries. The fish spawn in the spring, and variable participation rates by adults in spawning and annual differences in environmental conditions result in variable year class strengths. Known spawning rivers in New Brunswick are the Saint John, Richibucto, Bouctouche, Kouchibouguac, Miramichi, and Tabisuntac. Suspected spawning rivers include the Petitcodiac, Bouctouche, Pokemouche and Nepisiguit. A formerly popular period of exploitation by anglers was during spawning, although recently implemented delays in the open season have largely eliminated this fishery. This closure plus the minimum length limit of 68 cm has, for the most part, closed the recreational striped bass fishery in New Brunswick. Much of the past angling activity has been solely or partially for commercial purposes as much of the catch in past years has been sold.

New Brunswick is near the northern edge of the range for the species. Current striped bass populations are very low which may be the normal situation, since populations on the edge of their natural range are known to exhibit extreme shifts in abundance. However, populations have been in decline in recent years, a trend which is thought to be due to overfishing.

Prospects for a recreational fishery from which outfitters could derive benefits depend upon rebuilding the stocks of striped bass. Restrictive regulations on the commercial and recreational fisheries should help. Other potential intervention which would lower mortality of bass and increase spawning populations include the following:

- A two or three week delay in the opening of the commercial smelt fishery in the estuaries of known bass spawning rivers should allow young of the year bass to become established in overwintering territory. It is suspected that the bass are currently being taken during their migration into overwintering habitat.

- The building of escape mechanisms for striped bass juveniles in the bottom of gaspereau traps would reduce by-catch.

- The stocking of striped bass for colonization of rivers such as the Pokemouche and for enhancing existing populations is being considered. The Miramichi Fish Culture Station at South Esk is the probable site for this activity.

If populations respond to current and proposed management strategies, the Gulf stocks of striped bass, which are genetically distinct from the Fundy and American stocks offer the most promise for providing a fishery. These stocks seem to have predictable migratory patterns and are available to the angler in shallow water where they can be taken by spin casting.

HUNTING RESOURCE BASE

The recreational resource harvest in New Brunswick takes advantage of the wide variety of potential game species native to the province. The following section outlines particulars of this resource base of mammals and birds under the more specific headings of large game mammals, small game mammals, upland birds and waterfowl.

Game Mammals

There are 57 species of mammals native to New Brunswick (Dilworth, 1984). Of these, three can be described as large game and 15 as small game species.

Game harvest in New Brunswick is regulated under the Fish and Wildlife Act. The province is divided into 27 wildlife management zones (WMZs). The WMZs were defined to reflect area features relevant to wildlife and wildlife habitat, including climate, topography, geology and soils. Management flexibility is provided by enabling resource managers to change harvest and habitat management policies to reflect changes in more dynamic features, such as forest composition, land use, harvest pressure and wildlife population size (NBDNRE, undated).

Each year, allowable harvest limits within each WMZ are set by the NB Department of Natural Resources and Energy. For instance, in 1992 deer harvest was permitted in 20 of the 27 WMZs, with an allowable harvest quota set for each zone. Hunter success is calculated per zone each year to assess the current status of the game population in that area of the province. Conditions among the 27 WMZs are greatly varied, ranging from highly developed areas, especially in the southern portion of the province, to areas of limited developed, especially in the north central portion of the province.

Large Game

Large game species in New Brunswick are limited to deer, moose and bear. By far, the most popular harvested species is deer.

Deer:

Deer and moose are the only species of ungulates native to the province. Deer and moose are harvested in New Brunswick for sport, meat and trophy. As trophies, the large antlers grown by the males of both species are shed each winter, with a new rack grown each spring.

New Brunswick has a reputation among North American hunters for supporting a population of large deer (D.Palmer, associate, Custom Gunmakers Guild of America, personal communication, 1993). The average weight of harvested adult males exceeds 80 kg, dressed weight, with bucks over 122 kg harvested each year. Deer require mixed cover types close to water. They utilize open areas and stands for bedding areas.

Harsh winters are the major limiting factor for deer and moose populations in New Brunswick (Choate, 1973). Deer in this region tend to group together in suitable deer wintering areas (DWAs) during severe winter weather. DWAs typically consist of dense softwood stands near regenerating hardwood; they may also include young riparian stands. Moore and Boer (1977) report that New Brunswick DWAs tend to consist of spruce and balsam fir stands in riparian zones or south facing gentle slopes, with at least 70% canopy closure. DWAs are more limited in the southern and eastern portions of the Saint John River basin (Choate, 1973). Due to less severe winters, deer and moose wintering habitat is not as critical a feature in southern areas of the province as opposed to the northern half of the province.

Two seasons are offered for deer harvest each fall. The first season runs approximately one week and is available for bow hunters only. This season represents a much smaller harvest and group of hunters than the regular firearm season. The regular season follows the bow season, lasting four weeks. Harvest of bucks is permitted in all WMZs where deer harvest is permitted. An antlerless deer harvest program was initiated in 1989. Validation tags are distributed via a lottery, permitting the harvest of one deer without visible antlers in an WMZ where such harvest is permitted. Harvest in the southern half of the province tends to be much higher than in the northern areas.

Moose:

Moose are the largest land mammal on the continent, typically weighing up to 635 kg in New Brunswick. Moose require permanent water sources with abundant aquatic vegetation, as well as shrubs and mixed stands for cover and food. Moose tend to yard only in the most severe winter conditions, utilizing balsam fir thickets

as required.

Moose harvest permits are issued to residents only, through an annual lottery. The harvest season lasts three days only, the last weekend of September each year. A total of 6,000 applicants are chosen throughout the province each year (i.e., since 1974). First time moose hunters are required to pass a written test and shooting test prior to each year's hunt. Recent census information indicates that the New Brunswick moose population consists of approximately 20,000 animals (NBDNRE, 1993).

Black Bear:

The New Brunswick black bear is a large omnivorous animal, typically reaching a weight of 125 kg. Much smaller than the more western brown and grizzly bears, the black bear is not a true hibernator and will frequently come out of its winter den on warm winter days. The black bear requires thick softwood and mixed cover, and will also utilize swamps and old growth forests. Dens are typically found in rough rocky terrain. Bears utilize bushy openings and lakes for food and water sources.

There are three seasons for resident and non-resident hunters in New Brunswick. Unlike other large game harvest in the province, the majority of bear hunters are non-resident hunters (e.g., 68% in 1992)(NBDNRE, 1993). The most popular and most productive season is the spring rifle season, lasting 10 weeks between April and June. The second season is a fall bow hunting season occurring in late September for 2 weeks. The final season is a seven week fall rifle season between October and November. Bears are typically hunted from tree stands and are hunted almost solely for sport and trophy.

Small Game

New Brunswick's small game species represent varied opportunities for harvest, including hunting, trapping and snaring. Hunting is generally conducted for recreation or population control in the case of nuisance species (e.g., coyote). Trapping and snaring have traditionally been carried out as a commercial fur harvest, but are also conducted for recreation and population control.

Small game species harvested as fur bearers by licensed trappers include muskrat, beaver, mink, weasel, red fox, coyote, raccoon, marten, squirrel, otter, skunk and fisher (NBDNRE, 1990). Fur-bearer harvest licences (ie.e, trapping and snaring) are available for residents only, and thus provide extremely limited outfitter opportunity. Non-resident hunters may hunt small game mammals while hunting

under a deer, bear, varmint or archery licence.

Game Birds

Approximately 350 species of birds inhabit the province during the year (Squires, 1976). Of these approximately 5 upland species and 26 species of waterfowl are harvested.

Waterfowl:

Waterfowl harvested in New Brunswick include both ducks and geese, including the following(Levésque et al.,1993):

Marsh Ducks:	mallard, American black duck, gadwall, American widgeon, American green-winged teal, blue-winged teal, northern shoveler, northern pintail, wood duck
Diving Ducks:	ring-necked duck, common goldeneye, Barrow's goldeneye, bufflehead, oldsquaw, common eider, black scoter, white-winged scoter, surf scoter, greater scaup, lesser scaup
Stiff-tailed Ducks:	ruddy duck
Mergansers:	common merganser, red-breasted merganser, hooded merganser
Geese:	lesser snow goose, Canada goose

Waterfowl harvest in New Brunswick is largely confined to the Saint John River watershed and coastal marshes. Environment Canada defined three zones in the province for hunting waterfowl. Permits issued to hunt migratory birds in New Brunswick (i.e., waterfowl plus woodcock and snipe) ranged from 7,739 to 15,249 between 1966 and 1991 (Levésque et al., 1993). The annual waterfowl harvest is timed to coincide with the migration of these species through the province in the fall.

REGULATION OF THE RESOURCE

While several provincial and federal government agencies cooperate to provide protection of provincial resources, the Province of New Brunswick has sole ownership of fish and wildlife within the province (Section 3(1), NB Fish and Wildlife Act). Thus, utilization and harvest of New Brunswick resources falls under the direction of the provincial government. The exception to this rule is in the case where provincial resources may also inhabit or occur across

provincial/national borders (e.g., coastal and inland fisheries are also a federal responsibility). In such cases, the provincial and federal governments have taken a cooperative approach to resource management.

The principal agency involved in resource management is the Department of Natural Resources and Energy. This agency is responsible for assessing provincial wildlife resources, setting harvest limits and regulations and participating in enforcement of harvest regulations. The primary statute defining these responsibilities is the Fish and Wildlife Act, and its regulations. The following discussion outlines current provisions under this statute.

Fish and Wildlife Act

The New Brunswick Fish and Wildlife Act outlines the responsibilities of persons harvesting fish and wildlife (including mammals and most upland birds, but not migratory birds) and the offenses which may be incurred by contravention of these responsibilities. Specifically, the Act stipulates that a licence must be obtained to: hunt, trap or snare wildlife; to buy sell of barter pelts or flesh of wildlife; to operate a game bird farm; to act as a taxidermist; and a permit must be obtained to capture wildlife; import or keep exotic wildlife; and export wildlife.

In reference to outfitter operations, the Act requires that non-resident hunters and anglers be accompanied by a licensed guide, except with specific exception from the Minister. Two levels of guides are defined by the Act. A Guide I may accompany and guide up to three persons, and may not hunt or fish while so doing and may receive payment for their guiding. A Guide II may only accompany one person at a time, but is permitted to hunt or fish while guiding that individual. Each guide is responsible for ensuring that the non-resident hunter and angler follow the relevant regulations concerning that harvest activity. Under most circumstances, a Guide I licence is required to accompany non-resident hunters and anglers. A Guide II licence empowers the guide to accompany former provincial residents; non-residents owning provincial property worth in excess of $10,000; official guests of the Province; and non-resident personal family members or friends.

Various stipulations of the Act restrict specific hunter and fishing activities, such as the following:

- do not hunt deer, moose or bear in closed season or with a trap or snare;

- do not hunt wildlife at night, or with dogs or lights, except under specific conditions;
- do not hunt, fish, trap or snare without the appropriate licence;
- do not hunt on an official day of rest (i.e., Sunday); and
- do not fish for Atlantic salmon by any means other than fly fishing (unless so authorized under the federal Fisheries Act).

The Act provides the Minister of Natural Resources and Energy with the authority to establish various regulations, including the definition of catch limits and seasons for the harvest of fish and wildlife within the province.

Of specific interest to this discussion are the Moose Hunting, General Angling, Fur Harvesting and Hunting Regulations.

Wildlife Harvest Regulations

Wildlife harvest is conducted by either hunting, trapping or snaring. By far the most prevalent of these activities is hunting, with roughly 21% of the population participating in this sport. This percentage participation represents twice the national average participation in hunting (NBDNRE, 1991). Various hunting licences are offered to both residents and non-residents of the province, as outlined in the Hunting Regulation.

Hunting regulations provide for the type of firearm and bow used, the daily bag and possession limit for certain regulated game species and the open season for hunting. Bag limits and seasons apply to both resident and non-resident hunters, with or without licenced guides.

As with hunting licences, various different trapping licences are available for residents and non-residents, authorizing the harvest and method of harvest of various fur-bearing mammals, as defined in the Fur Harvesting Regulation.

Migratory Bird Harvest Regulation

Due to the occurrence of migratory species across jurisdictional boundaries, the regulation of migratory birds is administered by a federal agency, the Canadian Wildlife Service of Environment Canada. Migratory birds include all waterfowl (ducks and geese), woodcock and snipe, harvested from inland or coastal waters. Migratory bird hunting is carried out in one of three zones in New Brunswick. Hunting permits are available from Environment Canada, but may also be

purchased at Canada Post offices.

Open seasons for migratory birds are in the fall, coinciding with their migration south.

Fish Harvest Regulations

Under the federal Constitution Act (1867), the federal government has authority over the "sea coast and inland fisheries" within the country. However, the province of New Brunswick has principal authority over the fish and wildlife within its borders (New Brunswick Fish and Wildlife Act). In keeping with both these statutes, the general Angling Regulation of the New Brunswick Fish and Wildlife Act states that all provisions of the regulation are subject to those of the federal Fisheries Act. As a result, management strategies are defined to incorporate federal fisheries management objectives. Enforcement of angling regulations and protection of fisheries resources is carried out by both federal (i.e., Department of Fisheries and Oceans) and provincial (New Brunswick Department of Natural Resources and Energy) agencies.

SOFT ADVENTURE RESOURCES

Although the term "soft adventure" and its aggressive marketing is relatively new to the New Brunswick tourism industry, the concept has been exploited by some New Brunswick entrepreneurs and outfitters for some time. Soft adventure is a component of adventure travel, adventure travel being described as having an unusual, an exotic or a remote wilderness location, requiring participation of the traveller and occurring out-of-doors. Another module of adventure travel industry is hard adventure. The difference between soft adventure and hard adventure is based somewhat subjectively on the level of effort required by the participant. Soft adventure is considered to be at, or close to an entry level. Hard adventure requires a degree of experience. Soft adventure activities generally require less physical exertion, a lower level of proficiency or expertise, a shorter duration or length of stay, and soft adventure locations are generally not as remote as hard adventure locations. The type of individual that participates in soft adventure is generally described as a casual adventure traveller, compared to a committed adventure traveller or an expert adventure traveller. The casual adventure traveller's trips are one or two days in length, the goal being to get a taste of the adventure.

The extent of soft adventure opportunities in New Brunswick is vast. For the purposes of this study, we have focused on the following soft adventure activities:

canoeing and kayaking, bicycling, bird watching, skiing, snowmobiling, hiking, and viewing natural heritage sites or areas.

Overview of Soft Adventure Potential in New Brunswick

The adventure travel industry in New Brunswick is said to be in its infancy, with considerable potential for growth of the soft adventure component.

New Brunswick's land and seascapes, when compared to the mountains of the west coast, the expanse of the Arctic, or parts of Newfoundland is seen as less dramatic, less remote and less harsh. These conditions combined with the degree to which the Province has been developed make New Brunswick more appropriate for soft adventure and the casual adventure traveller than hard adventure.

The promotion of the soft adventure segment of the tourist industry has recently been given increasing priority in New Brunswick. The province has a number of strengths or attributes which can be utilized in the further development of the soft adventure market including:

- a good number of accommodations, some of which are high quality
- a rich and diverse heritage, with potential for upgrading
- a diversity of physical settings including: two dramatically different coastal areas, a range of forest types, backcountry, pastoral areas,
- extraordinary tides
- the northern half of the province has a good snowfall for winter activities

At the same time the province also has several detracting qualities that have to be overcome:

- New Brunswick is perceived as being undramatically flat, not rugged, uniformly forested, and generally not scenically appealing
- New Brunswick is viewed as a route to other destinations
- tourist operators and entrepreneurs have only recently become to respond to the soft adventure opportunity

- there is a shortage of quality heritage type accommodations,
- there is often conflicting land use (ie clear cutting next to national parks, pulp mill at Reversing Falls).

Traditional Soft Adventure Opportunities in New Brunswick

Canoeing and Kayaking

The best canoeing results when several components combine to provide an enjoyable experience. Those components include suitable and reasonable access to waterways, as well as put in/take out spots, a variety of good water conditions, scenic vistas, good camping areas and opportunities to view wildlife and fish.

Canoeing enthusiasts prefer combinations of fast (white) water and flat water areas while recreational canoeists may be content with a higher percentage of slow water. Waterways with the potential for a range of trip lengths, from half day trips to trips several days in length, are desirable. Short intense day trips on fast water, may be preferable to some, while longer trips on slower water with more view-scapes and scenery may appeal to others. Longer trips require suitable camping locations. Camping area requirements range from dry areas providing primitive one party campsites to larger and more elaborate facilities. An impression of quality wilderness and opportunities for wildlife viewing further enhance the canoeing experience. Portages, guides, and good fishing will also be considerations for some canoeists.

Access to virtually all areas of the Province are possible on the network of waterways and historic canoe portages connecting the major river systems. In addition to over 24 rivers (Patapedia, Kedgwick, Upsalquitch, Restigouche, Saint John (upper middle and lower sections), Tobique, Eel, Nashwaak, Oromocto, Portobello, Kennebecasis, Petitcodiac, Southwest Miramichi, Northwest Miramichi, Little Southwest Miramichi, Cains, Dungarvon, Kouchibouguac, Richibucto, Tetagouche, Magaguadavic), there are several lakes systems providing excellent canoeing opportunities.

Canoeing on New Brunswick waterways may begin soon after ice breakup, but the season is generally viewed as extending from the end of May through September, depending on the weather. Low water conditions during summer low flows may inhibit canoeing on some of the rivers with smaller drainage basins.

When compared to rivers elsewhere, New Brunswick's rivers and lakes may not

be viewed as offering a hard adventure experience. New Brunswick waterways could provide an opportunity for the larger market of the casual adventure traveller. Family oriented canoeists, or recreational canoeists from the entry level to the enthusiast, may find a canoeing package an appealing prospect. Many of the rivers and lakes of the province offer a sense of isolation, opportunities to view nature, fishing and hunting, and are rich in local history. Organized canoeing expeditions are currently available, and at least two canoeing associations function within the province.

Canoeing in New Brunswick could be enhanced through the identification of additional canoe routes, possibly combining river and lake travel. Identification and marking of historic portages to connect river systems could extend the canoeing or hiking experience. Mapping of existing and new routes, and identification as a minimum of interpretation of the natural and human heritage sites along these routes would enhance the experience. Although several canoe schools and clinics already operate in the province, and there are several commercial equipment rental outlets, outfitters could provide these services as well.

Although different modes of travel, each with its own qualities and skill requirements, canoeing and kayaking share many of the same environmental and recreational requirements, and the potential for growth. Kayaking can involve white water conditions, touring on inland rivers and lakes, coastal touring and "surfing." Both sea canoeing and kayaking are gaining in popularity, with courses being offered in some coastal areas.

In freshwater kayaking the participant generally favours white water conditions, although touring on rivers and lakes is a growing alternative. As well as headlands, good sea kayaking areas require islands, inlets and channels protected from rough sea conditions. The opportunity for kayak "surfing" is an other asset. In both freshwater and sea kayaking scenic areas, wilderness, beaches for landing, and beachcombing opportunities are assets. The current trend for sea kayaking would appear to be day trips rather than extended touring. Water temperature and weather patterns are considerations.

New Brunswick's fresh water kayaking season begins with the high and fast water conditions of the spring freshet, and continues through to freeze up.

Areas where kayaking is currently carried out include the Passamaquoddy region, Shediac, and the Fundy National Park area and the lower Saint John River. During spring high water conditions local enthusiasts may exploit rougher sections

of many rivers such as the Nepisiguit River and the Eel River. Kayak instruction and workshops are held throughout the Province. As with canoeing there is opportunity for kayak touring on larger lakes and rivers. Interest in sea kayaking of coastal areas such as the Passamaquoddy area Shediac Bay and the dramatic coastline in the Fundy Park vicinity is growing.

Canoeing and kayaking as soft adventures could be improved with development and promotion of coastal/river/lake tour packages. Packages could include accommodations at suitable outfitter establishments. If outfitting establishments are not available the package could incorporate local motels or inns. Mapping of tour routes, and possibly interpretation of natural and heritage sites and the provision of guides are possible extensions of outfitting services.

Bicycling

Bicycling can be sub-divided into three categories; racing, touring and mountain biking. Touring and mountain biking are the two most promising options for exploitation by outfitters.

Bike tours may vary in duration from hours to day tours to tours of several weeks. Longer tours often include support vehicles and staff, and a stock of spare equipment/parts. In New Brunswick the popularity of cycling has grown over the last few years. This popularity reflects the scenic nature, the network of secondary and back roads, and accommodations provided by both inns and bed and breakfasts.

The Province has developed small scale mapping accompanied by short descriptions for several shorter routes (under 100 km). These are generally found in the southern half of the province. around Fredericton (3 proposed routes), the lower Saint John River valley (7 proposed routes), and the Passamaquoddy area. Bike touring operators run tours in several areas such as the Sussex area. All areas feature nature viewing, architecture and in the case of Sussex several covered wooden bridges. The Acadian Peninsula of the Northumberland coast has at least five routes covering the coast from Neguac to Jacquet River.

This growing recreational sport may provide some opportunities for outfitters. Requiring a minimum of prepared trail, mountain bikes are capable of operation on surfaces ranging from pavement to packed gravel/mud to woods trails. In contrast to touring, the mountain bike enthusiast looks for more difficult, challenging terrain. Isolated areas with opportunities for nature viewing are assets. This sport naturally appeals to those in reasonable physical condition.

New Brunswick has several qualities which make it suitable for bike touring. uncrowded secondary road system, gentle gradient of many areas of the province, pastoral/fishing communities, historic sites, opportunities for nature viewing, ferries on picturesque lower Saint John River and heritage accommodations. The potential for growth of bicycling is considerable.

The resource could be enhanced by promotion in suitable markets, which describes tour packages, detailed routes and trails that incorporate local scenery, and identification of sites and services, such as rental locations.

Bird Watching

New Brunswick's two distinct coastal types and varied inland environs provide habitat to over 350 bird species. Flyways and migration routes over areas of the Province provide suitable birding opportunities for the novice to avid birder. Birding sites occur in several areas around the province. Odell Park in Fredericton is a wild land recreational area of approx 120 ha. with several habitats supporting bird activity year round. The lower Saint John River is part of an important flyway, especially for waterfowl. Deer, Campobello, and Grand Manan Islands, from August through October, have large and varied bird populations drawn by abundant marine life. In Saint John several varied habitat locations provide opportunities from May to September.

The boreal forest of Fundy National Park is a good location to view migrant songbird movement. Strategically located along coastal migration routes, the Shepody National Wildlife Area, the huge Tintamarre National Wildlife Area and the Cape Jourimain National Wildlife Area provide a diversity of habitats with outstanding birding opportunities. Kouchibouguac National Park is on spring and fall migration routes, and tidal flats at Bathurst Harbour provide nesting for vagrant waterbirds. Eel River Bar is visited by migrant and summering waterbirds and waterfowl. The Kedgwick River roadside, the Mount Carleton Provincial Park wilderness and the Plaster Rock-Renous Highway provide abundant opportunity to observe birdsong at its peak during early summer and summer.

Nearly all of these locations are close to accommodations and services, most have trails, and knowledgable staff are available at a few. The ample birding locations, diversity of habitat and range of species cold provide strategically situated outfitters with additional marketing opportunities, in particular those outfitters located close to the lower Saint John River, the Grand Manan archipelago, and the Shepody-Tintamarre area.

Natural Heritage

Virtually all soft adventure activities provide an opportunity to view and appreciate the surrounding natural heritage. This can occur year round, and in all regions of the province. This appreciation of natural heritage may include activities as photography or viewing of birds or wildlife, scenic vistas, plants, enjoying the fall colours or geological formations. Viewing the province's natural heritage is seen as a non consumptive activity with the primary focus of observation and interpretation of a heritage feature. In areas such as parks this often includes guides or signage and interpretative centres. Although wilderness areas may be preferred to view natural heritage features, this activity can occur in most areas, regardless of degree of development. New Brunswick has a diversity and variety of species and settings in part due to is position on the coast.

Outfitters in various locations throughout the province have opportunities to develop packages based on various natural heritage features in their region.

Cross Country Skiing

Cross country skiing in New Brunswick is usually based on day trips, although there is potential for expansion of the sport to include hut to hut touring and lodges. Hut touring or multi day back-packing/ski touring to cabins linked by trails in lake areas has good potential. In either case a network of groomed trails (for varying levels of expertise) over and through different environments and terrain are required. Generally, four months of suitable climate is a minimum. There may be conflict between cross country skiers and snowmobilers. Several skiing organizations exist within the province, including the Bathurst Sports Chalet with 25 kms of trails, and the Rough Waters Ski Club also based in Bathurst.

Snowmobiling

There are an estimated 10 million snowmobile enthusiasts across the North American snowbelt. Snowmobiling can be a physically demanding and fatiguing sport. Fatigue can cause poor judgement of the relationship between various conditions, and can effect the decision making process. The combination of speed, and conditions make it important to recognize the capabilities and limitations of the individual and machine.

In New Brunswick snowmobiling occurs in all areas of the province. As a result of the heavier snowfalls, existing infrastructure and promotion of the sport in the northern half of New Brunswick, that area is recognized as a snowmobiling centre.

There are 63 clubs operating in new Brunswick under the New Brunswick Federation of Snowmobile Clubs. Membership has taken a leap from 3800 in 1992 to 7200 in 1993. The Federation,through its clubs,take on the responsibility of developing, maintaining and grooming a network of trails, erecting shelters, and securing land use agreements with land owners. The use of the trails is regulated by a permit system on a user pay basis. User pay systems are used in most of the Canadian provinces and American states.

A network of existing trails encompass the province making it possible to travel from the Saint John area to the Northumberland shore, north to the tip of the Acadian Peninsula. From the Acadian Peninsula trails lead across the norther portion of the province to Edmunston and from Edmunston south to Fredericton. From Fredericton trails lead overland to the Miramichi. Trails also lead to Maine, Nova Scotia, Quebec. Arrangements are in place to accommodate snowmobilers wishing to cross to Prince Edward Island via the ferry system.

Many motels from Woodstock to Bathurst have ready access to trails and cater to snowmobilers offering a range of services. In the Bathurst region a network of some 20 motels and hostels have been identified based on their ability to accommodate snowmobilers on and off the track. These motels often become snowmobile centres, and in addition to accommodations and food offer pools, saunas, loading ramps, heated repair bays, gym facilities, and guides. Packages often include information on local activities such as cross country skiing, dog sledding, ice fishing, tobogganing, sleigh rides and winter carnivals.

In 1994 Bathurst will again be home to the Atlantic Can-Am Challenge, a major competition held at sea-level on shaved ice. The Atlantic Can-AM Challenge draws the best from across North America reaching speeds of 120 MPH on the 660 foot ice track for year end points and a purse.

Superb snow conditions of northern New Brunswick, the isolated lakes and forested areas, access and winter roads provided by commercial forestry areas make that portion of the province well suited for snowmobiling. Local businesses have already initiated promotion of the sport regionally.

Hiking and Snowshoeing

Hiking (in the summer) and snowshoeing (during winter months) can be categorized as two types, day walking and overnight hiking. Overnight hiking, as the name implies, incorporates camping for one or more nights and is more expedition-like in nature.

Overnight hikers should have a degree of competence in orienteering and woodsmanship. Overnight hiking will involve the use of one or several base camps or else movement to new sites each day, similar to horseback riding. Favourable hiking conditions include high quality wilderness settings, preserved areas being especially preferred. If wilderness settings are not available then at least a sense of isolation is important. Plausible accessibility to established trails or reasonable cross county walking are required and opportunities for wildlife/nature viewing are definite assets.

There are over 50 marked hiking trails around the province ranging in length from less than a kilometre to 60 km. These occur throughout the Saint John River Valley, along the coast of the Bay of Fundy, along the southeastern shore, on the Acadian Peninsula and in the Restigouche uplands. All trails have points of interest. District Ranger Offices and Tourism New Brunswick can provide additional trail information. Several operators provide tour packages and guides.

This activity needs further promotion and development of additional regional hiking locations such as the Fundy Trail area.

DISTRIBUTION OF OUTFITTERS IN RELATION TO RESOURCES

Figures III-4 through III-8 illustrate the distribution of New Brunswick's outfitters in relation to some of the key resources described above. These figures will assist outfitters in identifying resources which might present opportunities to them for future product development.

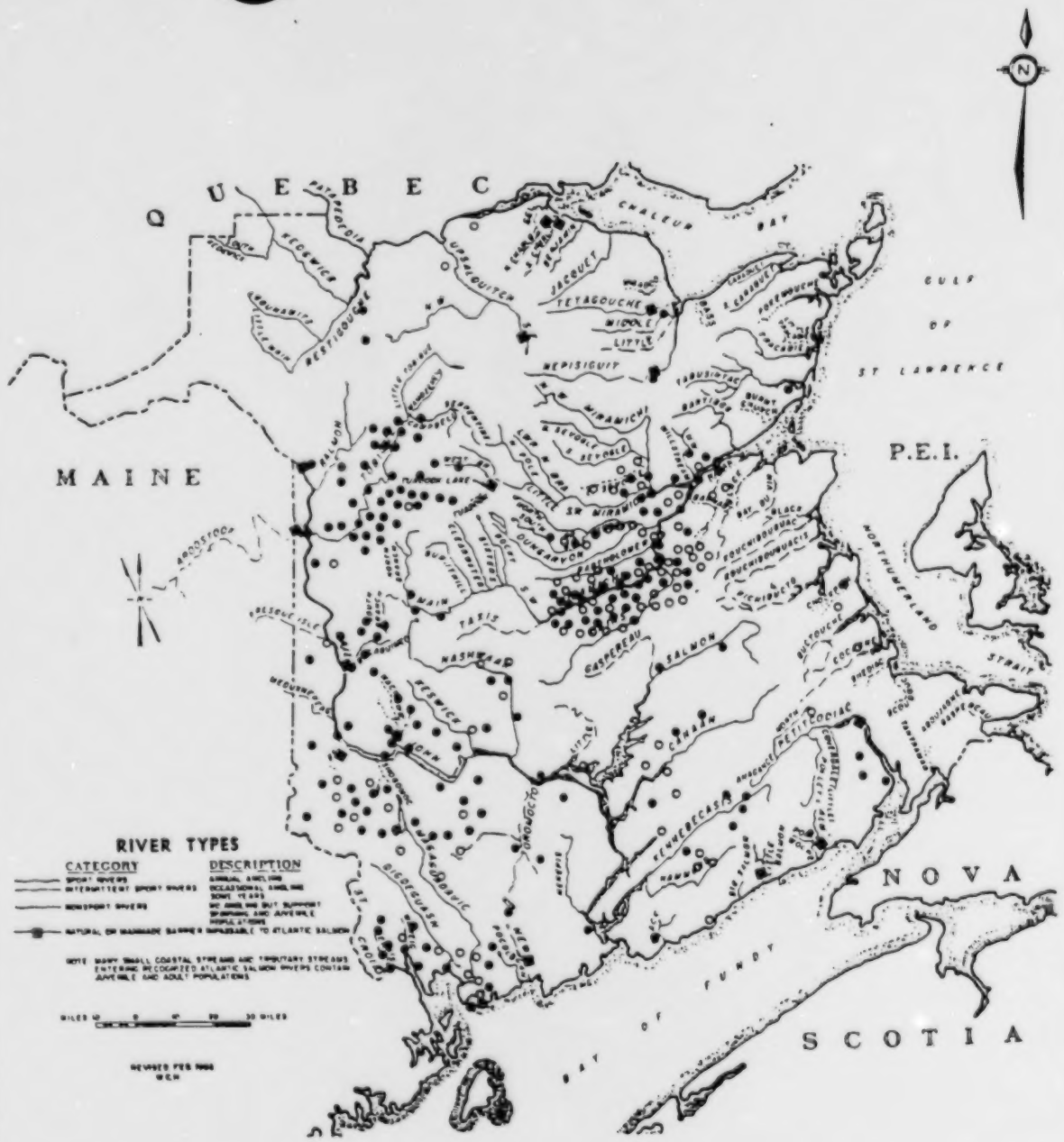


FIGURE III-4

DISTRIBUTION OF OUTFITTERS AND ATLANTIC SALMON RIVERS IN NEW BRUNSWICK

SOURCE: MODIFIED FROM NBDNRE, 1946.

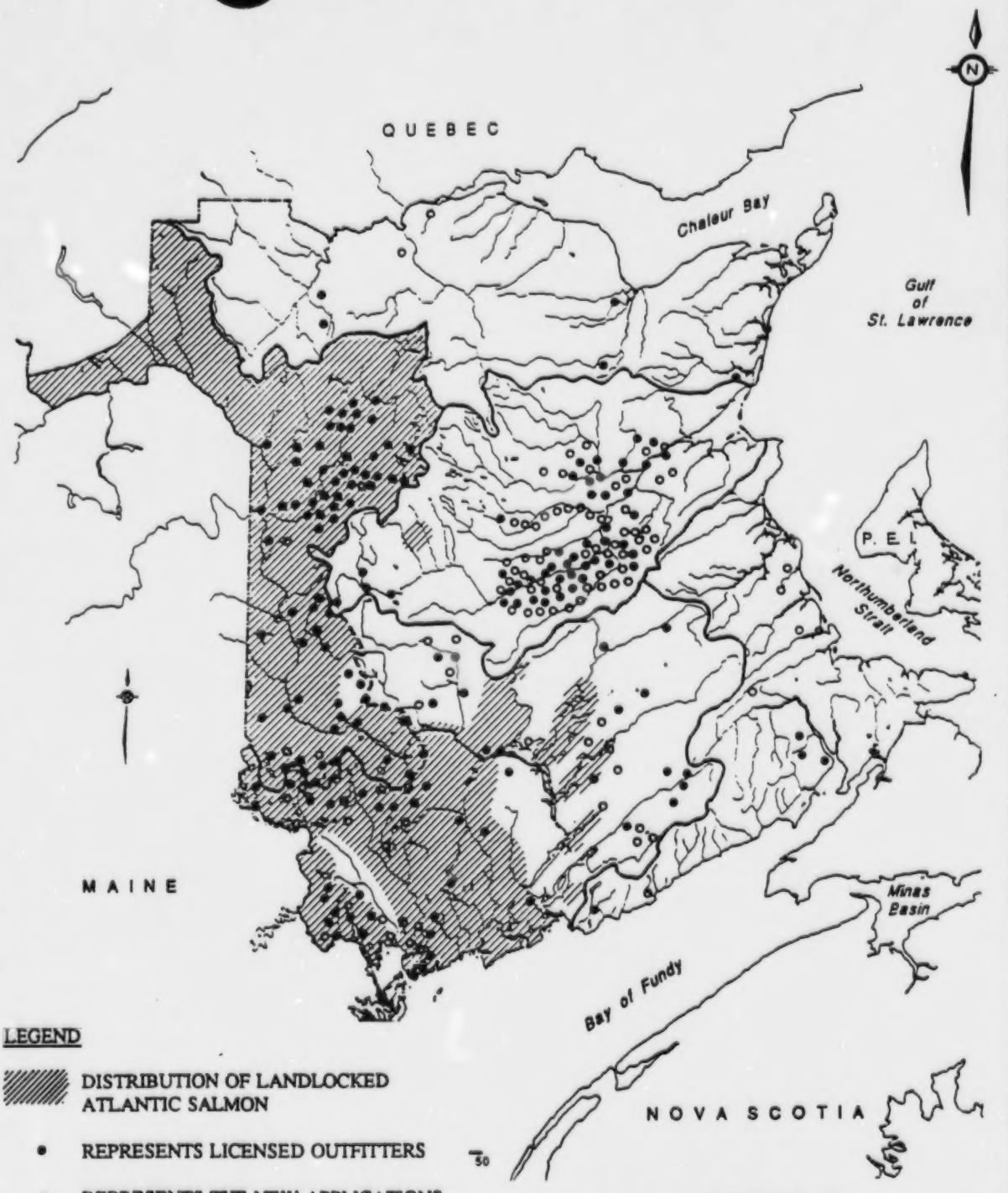


FIGURE III-5

DISTRIBUTION OF OUTFITTERS AND LANDLOCKED SALMON IN NEW BRUNSWICK

SOURCE : Modified from LGL Limited, 1993

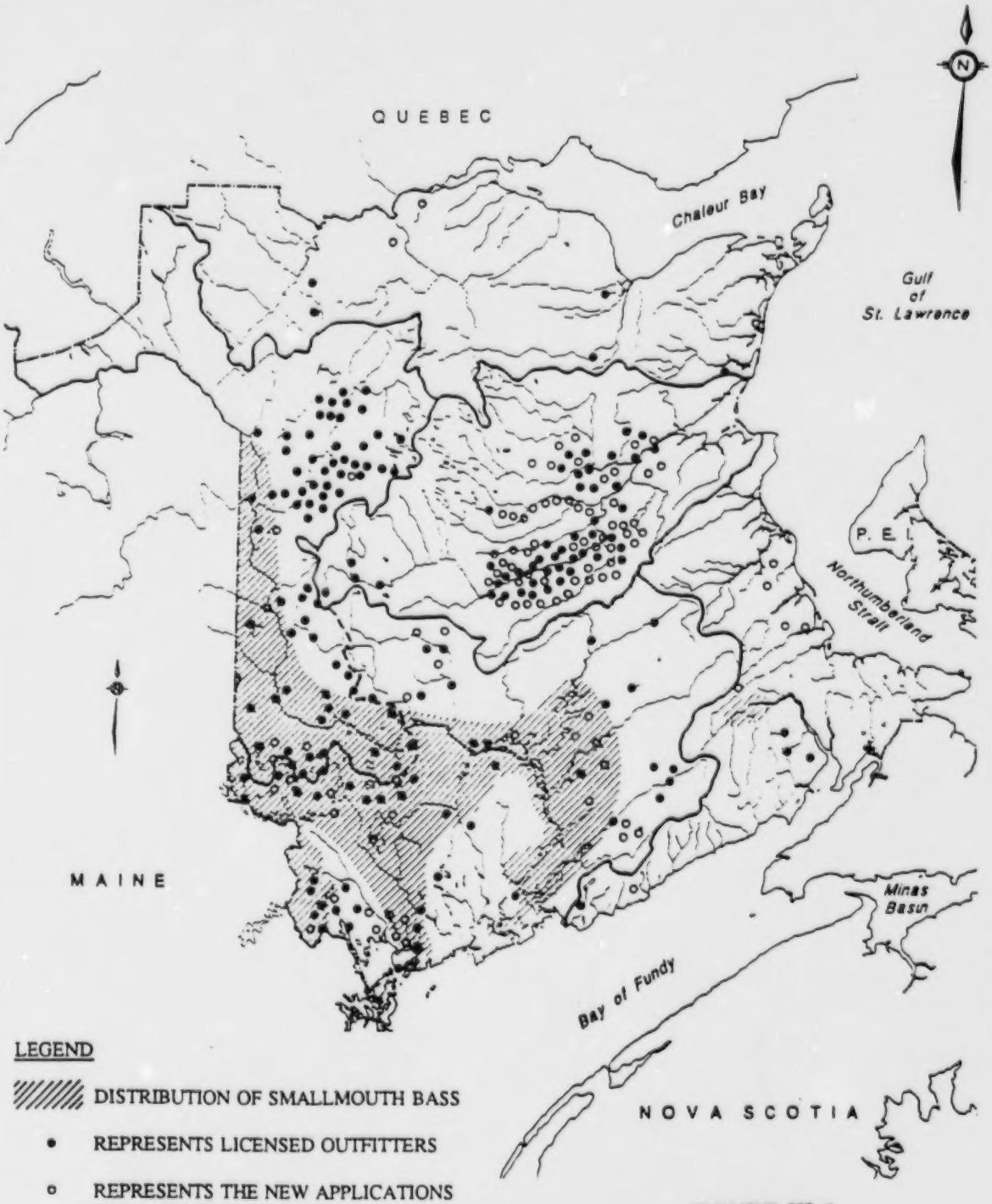


FIGURE III-6

DISTRIBUTION OF OUTFITTERS AND SMALLMOUTH BASS IN NEW BRUNSWICK

SOURCE : Modified from LGL Limited, 1993

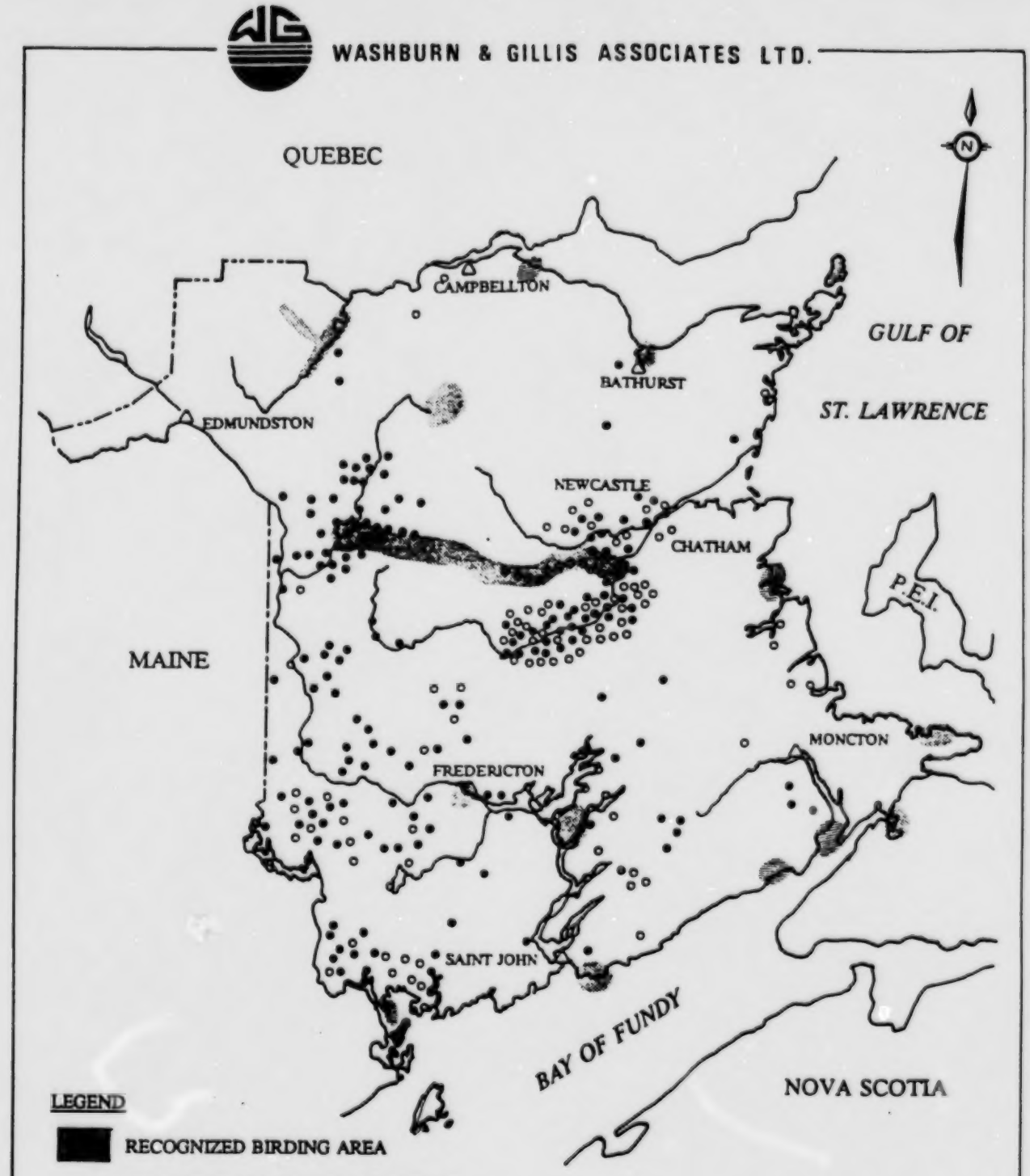


FIGURE III-7

DISTRIBUTION OF OUTFITTERS AND RECOGNIZED BIRDING AREAS IN NEW BRUNSWICK

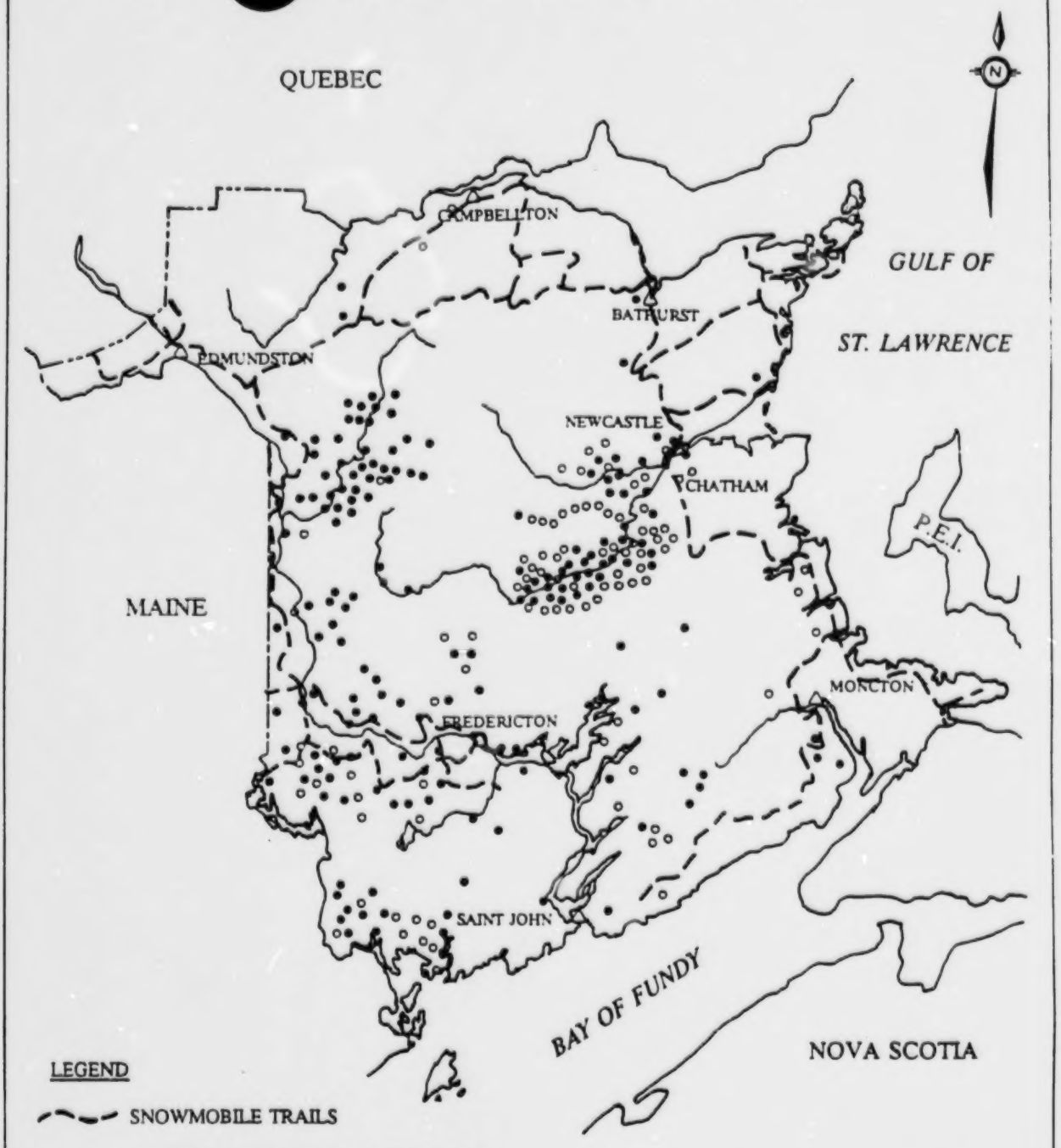


FIGURE III-8

DISTRIBUTION OF OUTFITTERS AND SNOWMOBILE TRAILS IN NEW BRUNSWICK

APPENDIX IV

ASSESSMENT OF THE COMPETITIVE SITUATION

APPENDIX IV

ASSESSMENT OF THE COMPETITIVE SITUATION

COMPETING JURISDICTIONS

Several destinations both in Canada and abroad compete for hunting and fishing markets with the province of New Brunswick. This section discusses the regions identified as *primary* (regional) competitors and *secondary* (remote) competitors to the hunting and fishing products in New Brunswick. Exhibit IV-1 summarizes the species available in the competing jurisdictions.

For each competing jurisdiction, a summary of the region's outfitting industry, primary resources, and existing regulatory framework are discussed. Samples of hunting and fishing packages are also given to provide an overview of competitor products and package elements.

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The primary competing regions for the hunting and fishing products available in New Brunswick have been identified by the consulting team as Nova Scotia, Maine, Quebec, and Newfoundland/Labrador. The following section presents a discussion of the outfitting industry in each of these jurisdictions.

NOVA SCOTIA

Nova Scotia competes regionally with New Brunswick for both hunting and fishing products and most notably for the Atlantic salmon. Other angling products available in the recreational fishery include American shad, pickerel, sea trout, smallmouth bass, striped bass, trout, and several saltwater sports-fishing species including bluefin tuna, shark, mackerel, striped bass, and bluefish. Nova Scotia's primary hunting products are black bear, white-tailed deer, coyote, moose (resident only), upland birds, and waterfowl.

Primary Fishing Resource

Atlantic Salmon

Nova Scotia's primary resource, the Atlantic salmon, is probably second to brook trout as a game species among Nova Scotia residents but is the primary target for non-resident anglers. Most Nova Scotia rivers are small, and angling quality is very dependent on water levels. Pools are also generally small and can accommodate only a few anglers. The majority of rivers have good late season

fishing while a few also have June and July fishing of acceptable quality. The

EXHIBIT IV-1

OUTFITTING COMPARABLE JURISDICTIONS
SUMMARY OF SPECIES AVAILABLE

PROVINCE/STATE	HUNTING SPECIES	FISHING SPECIES
PRIMARY COMPETING JURISDICTIONS		
Nova Scotia	**Black Bear**[1] Canada Geese Coyote Moose (residents only) Snowshoe Hare Upland Birds Waterfowl/ducks **White-tailed deer**	American Shad **Atlantic Salmon** Chain Pickerel Sea Trout Smallmouth Bass Striped Bass Trout SALTWATER SPORTS-FISHING Bluefin Tuna Bluefish Groundfish Mackerel Shark Striped Bass
Maine	Big Game: **Black Bear** Bobcat Coyote **Deer** **Moose** Small Game: Cottontail Rabbit Fox Gray Squirrel Opossum Porcupine Raccoon Red Squirrel Skunk Snowshoe Hare Woodchuck Upland Gamebirds: Bobwhite Quail Common Snipe Pheasant Ruffed Grouse Wild Turkey Woodcock Waterfowl: Black Duck Canada Geese Sea Duck Wood Duck	Atlantic Salmon Brook Trout Brown Trout Lake Trout (Togue) **Landlocked Salmon** Largemouth Bass Pickerel **Smallmouth Bass** White Perch Yellow Perch Saltwater Sports-fishing Bluefish Cod Cunners Cusk Flounders Giant Tuna Haddock Hake Halibut Mackerel Pollock Shark Striped Bass Wolffish

[1]Primary resources are indicated in bold text.

EXHIBIT IV-1

OUTFITTING COMPARABLE JURISDICTIONS
SUMMARY OF SPECIES AVAILABLE

PROVINCE/STATE	HUNTING SPECIES	FISHING SPECIES
Quebec	**Black Bear** Caribou **Moose** Small game **White-tailed deer**	Arctic Char Atlantic Salmon Bass Brown Trout **Brook Trout** Lake Trout (Togue) Landlocked Salmon Northern Pike Perch Sea Trout Speckled Trout Sturgeon Walleye Whitefish
Newfoundland	**Black Bear** Caribou **Moose** Ruffed Grouse Spruce Grouse Ptarmigan	**Atlantic Salmon** **Brook Trout** Landlocked Salmon
SECONDARY COMPETING JURISDICTIONS		
Ontario	**Bear** **Deer** Game Bird Moose Small Game	Bluegill **Brook Trout** Catfish Lake Trout (Togue) Largemouth Bass Muskie Northern Pike Panfish Perch Rainbow Trout Rock Bass Salmon Sauger Smallmouth Bass Splake Sturgeon Walleye Whitefish

EXHIBIT IV-1

OUTFITTING COMPARABLE JURISDICTIONS
SUMMARY OF SPECIES AVAILABLE

PROVINCE/STATE	HUNTING SPECIES	FISHING SPECIES
Alberta	BIG GAME *Antelope Bighorn Sheep **Black Bear** Elk *Grizzly Bear **Moose** Mule Deer **White-tailed Deer** (* require special hunting license) OTHER GAME Coyote Rabbit Red Fox Timber Wolf UPLAND GAME BIRDS Blue Grouse Gray Partridge Merriam's Turkey Ring-necked Pheasant Ruffed Grouse Sage Grouse Sharp-tailed Grouse Spruce Grouse White-tailed Ptarmigan Willow Ptarmigan WATERFOWL Canada Goose Common Snipe Coots Ducks Male Pheasant Ross' Geese Snow Geese White-fronted Geese	Arctic Grayling **Brook Trout** Brown Trout Bull Trout Burbot Cutthroat Trout Golden Trout Goldeye Lake Whitefish Lake Trout (Togue) Lake Sturgeon Mountain Whitefish Northern Pike Rainbow Trout Sauger Walleye Yellow Perch

best known Nova Scotia rivers are the Margaree, the LaHave, and the St. Marys. Formerly, there were productive salmon rivers in southwestern Nova Scotia but these have been severely affected by acid rain. The Medway has seen its catch per unit effort drop considerably in the last two decades for this reason. Generally, Nova Scotia salmon populations are not as healthy as those of New Brunswick (K. Rodman, DFO, personal communication).

Nova Scotia has a system of entirely public fishing waters that began when the Angling Act was passed in the 1920's. The Act gives ownership of all lakes and streams to the high water mark to the general public, and allows people to cross uncultivated private land to fish (Marriner, 1992).

For salmon management purposes, many Nova Scotia waters fall within the same Department of Fisheries and Oceans region as do the New Brunswick rivers which flow into the Bay of Fundy. All rivers flowing into the Bay of Fundy have had reduced salmon stocks in 1993. They were either closed to angling for the entire year, as in the case of the inner Bay of Fundy rivers, or later when the reduced stock abundance became apparent, as in the case of the Saint John and Magaguadavic Rivers.

Like New Brunswick, Nova Scotia has grilse-only kill regulations. As in New Brunswick, the percentage of grilse vs. salmon is typical of the stocks of individual rivers. For example the Margaree, like the Restigouche in NB, is known for its high percentage of large fish.

There is no black salmon season on Nova Scotia rivers as there is on New Brunswick rivers. Except for on the inner Fundy rivers where there is a high percentage of repeat spawning among grilse, and where the sex ratio among grilse stocks is approximately 50/50, there is no biological reason for not having a black salmon season. However, there has been little public demand for black salmon.

As in New Brunswick, the federal Department of Fisheries and Oceans has final management decision over the Nova Scotia Atlantic salmon stocks. Their management strategy with respect to stocking programs is therefore similar to that of New Brunswick. Nova Scotia employs habitat improvement programs for salmon resource enhancement. The Department of Fisheries and Oceans conducts experimental-scale habitat improvement projects, but in-practice, such projects are not popular or widespread. Since there is now private water in Nova Scotia, there are a few projects proposed for improving pools for salmon angling purposes.

A comparison of recent annual salmon catches of Nova Scotia and New Brunswick is presented in Exhibit IV-2. The data demonstrate that the salmon

EXHIBIT IV-2
COMPARISON OF NOVA SCOTIA AND NEW BRUNSWICK RECREATIONAL SALMON FISHERY

NOVA SCOTIA RIVERS				
River	**Mean Annual Catch†**	**Rod Days**	**Catch/Day**	**% Salmon vs. Grilse**
East River, Pictou	254	847	0.3	0.76
Gold	366	1220	0.3	0.32
LaHave	1867	6223	0.3	0.27
Musquodoboit	359	3590	0.1	0.33
St. Mary's	1351	6755	0.2	0.26
Medway	693	3465	0.2	0.30
Moser	197	1970	0.1	0.11
Stewiacke	Inner Fundy stocks in NB and NS severely depressed.			
Salmon, Guysborough Co.	234	1170	0.2	0.35
Tusket	175	583	0.3	0.32
Grand	481	2405	0.2	0.25
Margaree	1488	7340	0.2	0.53
River Phillip	200	500	0.4	0.73
North, Victoria Co.	455	1517	0.3	0.71
Mean Catch/Rod-Day	0.22			

NEW BRUNSWICK††				
River	**Mean Annual Catch†**	**Rod Days**	**Catch/Day**	**% Salmon vs. Grilse**
Main S.W. Miramichi	15607	28902	0.54	0.31
Little S.W. Miramichi	2982	5847	0.51	0.20
N.W. Miramichi	4803	10441	0.46	0.22
Sevogle	1386	3150	0.44	0.21
Renous	1709	4069	0.42	0.18
Dungarvon	565	1569	0.36	0.22
Cains	941	1845	0.51	0.39
Bartibog	229	257	0.89	0.45
Saint John	2544	9785	0.26	0.43
Nashwaak	1609	10727	0.15	0.32
Tobique	1947	8465	0.23	0.39
Restigouche	4078	5511	0.74	0.49
Upsalquitch	1202	1878	0.64	0.32
Kedgwick	593	872	0.68	0.38
Nepisiguit	1313	4377	0.30	0.24
Mean Catch/Rod-Day	0.42			

† Mean annual catch is for the period from 1981-1991.
†† Bright salmon only.
Source: Marriner, 1992

resources of Nova Scotia rivers as exhibited by total catch, are not as strong as those of New Brunswick. The catch rates per unit effort demonstrate that the quality of angling in New Brunswick is similarly superior to that of Nova Scotia. The 40,000 fish caught during the bright salmon season on the Miramichi system in 1992 is approximately equivalent to 5 years of catch from the entire Province of Nova Scotia. The greater length of the river systems in New Brunswick also offers a greater opportunity for angling.

One proposal that is being explored by DFO and the Province of Nova Scotia is river-specific management. There is a regulatory framework in-place which will allow different regulations to apply for different rivers. This would allow, for example, large salmon to be retained on rivers where the grilse run is small, and there is currently a surplus of large fish. The idea has not been implemented to date. The considerations for implementation of river-specific management are as follows:

- Native concerns. If there is a surplus of large salmon, then how many should be allocated to the natives, and how many to the anglers?
- Biological considerations. Is there sufficient egg deposition allowed for by the proposed regulations?
- Are the proposed changes enforceable, or do they represent an enforcement problem on non-target rivers?
- Do the proposed changes fit with the provincial licensing mechanism?

There is a perception within DFO that special regulations for each river may become unruly and confusing to anglers and regulators. A compromise may be to have special regulations based on groupings of rivers or on a drainage area basis. For example, having uniformity in regulations across separate drainage basins rather than having broad general regulations across the province has been proposed for the province of New Brunswick.

Outfitting Industry

Nova Scotia's outfitting industry is small when compared to New Brunswick, with some 21 licensed outfitters. Outfitters provide a broad range of hunting and fishing products, but are primarily oriented to deer and bear hunting, as well as Atlantic salmon fishing. Some outfitters offer upland bird and waterfowl hunting as well.

Regulations

Outfitters and guides require a license in order to operate in Nova Scotia. The Department of Natural Resources (DNR) administers the licensing of both outfitters and guides in the province. Outfitters licenses are classified into Hunting Outfitter's license, Fishing Outfitter's license, or a Hunting and Fishing Outfitter's license.

Outfitters Licensing:

To acquire an outfitters license, an "outfitter" must have an accommodations establishment with a minimum of 3 bedrooms. These accommodations must be licensed by the Department of Tourism and Culture in order for the outfitter to be eligible for an outfitters license.

Only licensed outfitters are promoted in the province's Department of Tourism and Culture's tourism literature, i.e., the Nova Scotia Travel Guide.

Outfitting facilities which have 2 bedrooms or less do not require an outfitters license to operate, although the proprietor does require a guide licence. In Nova Scotia, most of these operators[2] are guides who provide accommodations out of their own homes.

The outfitters licensing requirement has been in place since 1991. These regulations were implemented by the provincial government in response to a lack of control regarding the quality of the outfitters and their impacts on wildlife resources, and consumer complaints regarding outfitter practices.

Outfitters in operation previous to the 1991 legislation were "grand-fathered", with subsequent outfitters applying for licensing under the new regulations. Each new license application is assessed on a case per case basis, where the major factors evaluated are the potential impacts of the new operation on existing outfitters, and the impacts of the new operator on the wildlife resources in the region. The Department of Natural Resources thus has the single authority to limit the number of licensed outfitters in a particular area, particularly if the wildlife resources in that area appear to be inadequate to support additional outfitters.

[2]These operators are not eligible for provincial tourism advertising initiatives since they are not licensed outfitters.

Outfitter licenses are issued at the Minister's discretion, with the total number of licenses not exceeding 52 (there are currently 21 licensed outfitters in Nova Scotia).

Other licensing requirements include that the outfitter employs a Master Guide (or that the outfitter is a licensed Master Guide him/herself), and that the outfitter carries liability insurance for public liability and property damage as outlined in the regulations.

In the case of a hunting *or* fishing outfitter license, the outfitter is required to provide equipment sufficient to adequately outfit at least four people for either hunting or fishing, depending upon the class of license. For a combined hunting ***and*** fishing outfitter licence, the outfitter must provide equipment for at least four people to hunt ***and*** four people to fish.

All outfitting licenses are administered on an annual basis, at a fee of $50.00. An outfitter may not have his license renewed if he has not conducted outfitting business in 2 years. Additionally, outfitter licenses may be revoked or suspended if the outfitter fails to comply with the outfitter regulations or any other enactment of the provincial Wildlife Act.

Other requirements regarding outfitters include control over advertising. The outfitter regulations stipulate that it is an offense for an outfitter to display or distribute any false information (including rates) regarding the outfitters quantity, quality, or nature of; accommodations, equipment, food, transportation, or other facilities or services.

Guide Licensing:

There are four classes of guide licenses in Nova Scotia; Recreational, Fishing, Hunting, and Master Guide. In addition, a Special Permit to Guide is a special license allowing Nova Scotia residents to accompany friends or relatives on hunting and fishing trips, either for compensation or not.

Guide licensing is administered by both a written and practical exam, and licenses are in effect for one calendar year. The testing material varies somewhat according to the licence category, but generally covers the topics of map and compass use, woods survival methods, and fishing and hunting techniques.

For all guide licenses, there is a prerequisite that the applicant hold current First Aid and C.P.R. certification. Other mandatory license prerequisites include Small Craft Safety Training certification (Fishing Guide), Hunter Education Training

certification (Hunting Guide and Master Guide), and the Bow Hunter and Professional Guides Course (Master Guide).

A Master Guide licence is issued to an individual with several years of guiding experience who is capable of guiding in all three guide categories - hunting, fishing, and recreation. Additionally, a Master Guide must be able to guide for all species which the outfitter provides.

Regulations regarding guiding methods include that a Hunting Guide may not guide more than 3 persons at a time while hunting. Additionally, a non-resident hunter in Nova Scotia is required to be accompanied by a licensed guide. Currently guides are not required for fishing, including for non-resident anglers. However, this situation may change due to the perception that non-resident anglers (i.e., salmon anglers) in Nova Scotia are not paying their "fair share" for fishing opportunities. A decision on mandatory guiding requirements for fishing is currently being considered in the province.

Sample Packages

The fishing packages identified in Exhibit IV-3 depict a variety of fishing experiences, ranging from a 2 hour deep-sea fishing tour to a 6 night general fishing and photography package with lodge accommodations. In Nova Scotia numerous properties offer fishing packages. Prices range from $450-$585 for a 2 day fishing package, dependent upon the number of meals and other amenities included. General package elements include the provision of a guide, most or all meals, and some provision for boats and transportation to the fishing location. Other more innovative elements include the provision of complimentary local salmon flies, camping gear, and air transportation from New England to Nova Scotia.

MAINE

Maine, the most northeastern U.S. state, borders New Brunswick's south-west side and competes most notably with New Brunswick for landlocked salmon, smallmouth bass, deer, and black bear. The following resource discussion highlights Maine's landlocked salmon resource.

EXHIBIT IV-3
NOVA SCOTIA FISHING PACKAGES

FISHING PACKAGE FEATURES									
Operator	**Species Avail. in Package**	**Accom. Type**	**# Nights**	**Guide**	**Meals**	**Transpor t-ation**	**Boat**	**Other**	**Price**
Big Intervale Lodge, Margaree Valley (Package sold by Ambassatours, Halifax)	salmon	Lodge/camp	2	Y	2 breakfast 1 lunch 2 dinner			Return transportation from Halifax, fishing gear, license	$585/person dbl occ. (min of 8)
Quarterdeck Restaurant and Cottages, Summerville	salmon, trout	Cottages	2	Y	1 picnic lunch	Y	Y	Canoe, boat, motor, fishing equipment, bait, waders.	*$460 for 2 (min of 2)
Normaway Inn, Margaree Valley	salmon, trout	Inn/cabins	3	Y (for 1½ day)	3 dinners 3 breakfast or picnic lunch			Complimentary salmon flies of the area.	$399/person dbl occ.
West Nova Hunting & Fishing Camps, Weymouth	striped bass, smallmouth bass, pickerel	Camp	3	Y	2 breakfast 2 lunch 3 dinner		Y	1 day salt-water striped bass excursion, 1 day smallmouth bass & pickerel excursion	$395/person dbl occ. (min of 4)
Liscombe Lodge, Liscomb Mills	salmon, trout	Lodge/ Cottages	2	Y	2 breakfast 2 dinner			Fishing equipment.	$450 dbl occ. (incl. taxes)
Beaver Island Lodge, Milton	General Fishing & Photography	Lodge/ Wilderness camping	6	Y	ALL	Y	Y	Return transportation from New York, New Jersey, or Boston to Yarmouth or Halifax; camping equipment, canoes, tackle, licenses.	$1499 US/person
Salmon Lake Lodge and Sunset Cottages, Sheet Harbour	trout, deep sea fishing	Lodge/ Cottages	6	Y	ALL			Equipment, license	$1,360 dbl occ.
Lane's Privateer Inn and Bed & Breakfast, Liverpool	deep-sea fishing	Inn/B & B	1	Y	1 breakfast 1 dinner afternoon tea			2 hour deep-sea fishing tour.	$103.95/person dbl occ. (incl. taxes & gratuities)

Primary Fishing Resource

Landlocked Salmon

The landlocked salmon is a very important sport fish in Maine. The three primary sportfish species in Maine are landlocks, brook trout and togue (lake trout). In 1981, Maine had 297 lakes comprising 637,125 acres (258,000 ha) that contained landlocked salmon populations. Of these, landlocked salmon provide a principal fishery in 192 with a total area of 543,114 acres (220,000 ha). The total area of habitat is important in the case of landlocked salmon in that they are a pelagic species. They are a mobile, off-bottom predator which, during the primary growing season, actively pursue their primary forage, the landlocked smelt. Smelt are also pelagic in that they graze the zooplankton within the water column throughout their home lake. This dependence on a wide-spread forage base is in contrast to brook trout which feed primarily on benthic invertebrates, which are concentrated in shallow water on lake shorelines. The dependence primarily on smelt also contrasts with togue which feed on many fish and even invertebrate species.

All lakes in Maine in excess of 10 acres are owned by the state, but access to larger waterbodies may be controlled on private roads through gates.

The best known landlocked salmon lakes in Maine are Moosehead, Sebago, Mooselookmeguntic, Chesuncook, West Grand, Rangely and East Grand. There are also popular stream fisheries which depend on spawning runs of salmon that emigrate from large lakes.

Anglers of course, attempt to catch trophy fish in all lakes with a trophy considered to be a fish in excess of 20" in length. The average size of fish taken in Maine during the open water season is 17.1", and in the winter season, 16.9". A few special lakes are managed for trophy fisheries with a 16" or 18" limit. These lakes are generally very fertile, and resident salmon have excellent natural growth rates. In some rivers where the salmon have no access to lakes, there are entirely river-based populations which do not have a source of smelt forage. On these rivers, there is a 12" minimum length limit to account for their slower growth. The general minimum size limit for retention is 14". Therefore, most lakes are managed for moderately sized fish with high yield fisheries. Maine's system of waterbody-specific management makes the interpretation and enforcement of regulations very difficult, however, and there is support for returning to more generalized regulations.

The favoured method of fishing landlocked salmon in Maine is by trolling streamer flys or hardware, although there is some fly fishing and spin casting done. As in New Brunswick, the fishing effort is concentrated early in the season when the fish are shallow and hungry. The summer season lasts from April 1 or ice-out until October 1. The winter season lasts from January 1 until March 31 on lakes designated for ice fishing. These lakes are those which are dependent primarily on hatchery recruits. Until recently, it was legal to fish salmon using live bait, primarily minnows or smelt. This has recently been discontinued because bait bucket stocking of lakes and the introduction of undesirable species was becoming common.

The Maine landlocked salmon fisheries are largely supported by hatchery stocking, although there is a much higher wild smolt production in Maine waterbodies than in New Brunswick. Maine's stocking guidelines allow for wild smolt production at annual stocking rates ranging from 0.5 to 1 fish per acre in lakes.

New Brunswick will never supplant Maine as the centre of the landlocked salmon angling world. Maine has more landlocked salmon water because it has more lakes. The area currently under management for landlocked salmon is approximately five times the potential area in New Brunswick. Maine has expert management biologists at the state and regional level, and a hatchery system that pumps out sufficient landlocked salmon smolts to maintain a productive fishery. Many of the more popular salmon lakes in Maine are probably over-fished, but many of the less well-known lakes probably could withstand more pressure (J. Trial, Maine Department of Inland Fish & Wildlife, personal communication). Maine has developed an aura for the coldwater fishing enthusiast typified by its institutions such as LL Bean, embodied in its famous salmon waters such as Sebago Lake, Moosehead lake and Grand lake Stream, and celebrated in movies (On Golden Pond).

In comparison, however, fishing pressure in NB is lower and fish size and catch per unit effort are therefore potentially greater than in Maine. This can be seen in that some anglers from Maine outfitting lodges come to fish in New Brunswick landlocked salmon lakes which are adjacent to the Maine border. These sportsmen only require a non-resident license, and all of the gear, food etc. is usually purchased in Maine. This provides very little revenue to the New Brunswick economy, but highlights that there is a potential to sell landlocked salmon angling to American sportsmen.

The landlocked salmon resource must be fully developed through an effective hatchery program, and New Brunswick must fill a niche that is currently not being adequately met in Maine. This might be achieved through exclusive outfitter

access to smaller lakes where there are adequate landlocked salmon populations that provide exceptional catch per unit effort rates or trophy fisheries.

Primary Hunting Resource

As with New Brunswick, Maine is at the northern edge of the range for deer. The principal management initiative is to identify deer wintering areas in both organized (municipal) and unorganized land. In Maine only 5% of land is publicly owned, so most mapping and management activity occurs on private land. They work with the land owners to implement a forest harvesting plan in deer yards.

The principal regulatory activity is to limit the harvest of antlerless (doe) deer to allow a rebound or a control of the deer population. There are 18 deer management zones in Maine, and there is a different antlerless quota for each, ranging from zero permits issued in Washington and Aroostook Counties where the deer population is depressed, to virtually on-request permits issued in southern and central zones. For each zone, a quota for antlerless deer harvest is set, then a multiplier factor, ranging from 4 to 7 is used to determine the number of permits for antlerless deer to issue. The population problems in Washington and Aroostook Counties relate to budworm damage which has required vast harvest of dying balsam fir stands. This has resulted in a lack of deer wintering habitat. There is also a severe poaching problem in Washington County. Predation by coyotes has also been identified as being a potential problem, and controlled coyote hunts in deer yards through an animal damage control program has been initiated. General coyote control programs are regarded as being ineffective at best.

In the south and central zones there is a deer overpopulation problem, which has resulted in damage to farm crops and to automobiles during collisions. The legislature has given permission for controlled hunts in limited problem areas after the regular deer season if more intensive harvest is required.

Deer overpopulation control is a major issue in other more southerly states. In such areas, it is a problem for management biologists to convince the public that very liberal harvest regulations are in their best interest. The problems of deer overpopulation will probably never exist in New Brunswick.

Outfitting Industry

Outfitted hunting and fishing is the 2nd largest industry in Maine, with some 20 active licenced guides who are members of the Maine Professional Guides

Association and participate in its guide/outfitter publication.

Trends

The Maine hunting industry is finding the deer and bear hunting market to be declining. Maine outfitters who cater to these markets are considered to be "low end" in terms of product and market, and these outfitters are not generally doing well. Conversely, the "higher end" outfitting such as upland bird hunting (with dogs and a guide), and fly-fishing are on the increase. This market tends to be more affluent and is willing to pay a higher price for hunting. Although providing hunting dogs is fairly expensive for outfitters, the high end birding market is perceived to be a relatively untapped and unlimited market.

Regulations

In Maine, outfitters do not require licenses, although the state does require that any person selling hunting or fishing experiences must have a professional guides license. The person is licensed rather than the outfitting property, and typically an outfitter has a guide license. The State of Maine has a certification program for guides that appears to be fairly stringent. Areas of knowledge tested include first aid as well as woodsman's training.

Today, the popular feeling in Maine is that the heyday of the Maine fishing guide is over. Guides are not required by non-resident sports-fishermen, as most of them own their own equipment and boats etc. (In New Brunswick a guide is not required by non-residents for fishing either.) In Maine, non-resident sportsmen may hire a guide for one or two outings to gain familiarity with an area, and then fish or hunt unaccompanied by a guide.

Problems have been experienced with regards to licensing in Maine, however, in that licenses are issued at the discretion of the Commissioner of the Department of Inland Fisheries and Wildlife and this single authority has caused ill will in the industry. Enforcement is also perceived to be weak, as often outfitter (guide) infractions to the hunting or fishing regulations are treated fairly leniently, with some infractions ignored and others receiving only a 6 month suspension (which in many cases does not affect their hunting/fishing season).

Markets

The markets for Maine's hunting and fishing outfitting products vary considerably. The deer and beer hunting markets tend to be regionally oriented with the majority coming from the North Eastern states. The fly-fishing and upland birding market

tends to come from farther afield, from all over the U.S., Japan, and England.

Opportunities

Some of Maine's outfitters have been attempting to diversify into soft adventure, but this has not been very successful. The non-consumptive market does not traditionally support high prices for wilderness experiences (i.e., walking, hiking, cross country skiing) as there is a perception that they can experience wilderness as well independently.

Sample Packages

Although Maine outfitters offer a variety of hunting and fishing packages, individual packages are not published in the outfitter publication, Maine Guide to Hunting and Fishing. Outfitters must be contacted individually with regard to pricing and thus only a small sample of packages was available for Exhibit IV-4.

QUEBEC

Quebec, particularly the northern region, competes directly with New Brunswick for black bear, white-tailed deer, salmon, and brook trout. The brook trout is considered to be the main competing fishing resource in Quebec.

Primary Fishing Resource

Brook Trout

The brook trout is the most popular species fished for in the Province of Quebec. It is present in all of Quebec, and prevalent in the Controlled Zones (ZEC's) and Wildlife Reserves of the Saguenay and North Shore. In the ZEC's and Wildlife Reserves, the fishery is managed for moderate size, high yield fisheries. The major angling methods used are trolling and fly fishing, with the best fishing occurring early in the year (April to July), although the season is open from April 23 to September 6-12.

A unique aspect of fish and wildlife management in Quebec is the controlled zone concept. There are 71 ZEC's in Quebec located in all areas of the Province except for New Quebec. There are three types of ZEC, the controlled hunting and fishing ZEC of which there are 61 in total, the controlled salmon ZEC of which there are 9, and one controlled waterfowl ZEC. In all ZEC's, users pay a daily or annual fee for use of the ZEC. In the hunting and fishing ZEC's no reservation has been required until recently. In these ZEC's, the catch of brook trout is

EXHIBIT IV-4

MAINE OUTFITTING PACKAGES

PACKAGE FEATURES									
Operator	**Type of Package**	**Accom. Type**	**# Nights**	**Guide**	**Meals**	**Transport-ation**	**Boat**	**Other**	**Price (per person)**
Spillover Motel, Stratton	H (deer)	motel	5	n	breakfast only	n	n		US$210/dbl occupancy
Castle Island Camps, Belgrade Lakes	F (bass, trout, salmon)	cottage	7	n	All meals	n	n	boat rental available	US$343/per. single occ.
Greenwood Motel, Greenville Junction	H (deer)	motel	7	n	All meals	n	n		US$289.95/per. dbl. occ.

limited on an annual basis, and for this reason, all catches must be reported. New regulations now allow the management authority to restrict access in the case of some species, and to restrict access to certain sectors in the case of others. In the salmon and waterfowl ZEC's, access is limited to certain dates held in the successful applicants name. In Wildlife Reserves, anglers fish on a reserve basis only, and there is a further control placed on exploitation through an annual quota on lakes, with mandatory reporting of catches.

Management for brook trout consists of the following activities in Quebec:

- stocking for population maintenance, range extension, put-grow-and-take and put-and-take;
- habitat improvement through spawning area improvement in lakes within ZEC's and rearing area improvement in streams;
- lake reclamation before brook trout introduction.

Outfitting Industry

The Quebec Ministry of Hunting and Fishing oversees the outfitting industry in the province. Additionally, the Quebec Outfitters Federation, the province's industry association, assists outfitters by publishing an industry newsletter and negotiating with government and other parties on their behalf. There are approximately 575 outfitters in the province.

Trends

Non-resident small game and black bear hunting have been increasing in recent years in Quebec. Other trends are increased caribou hunting, winter (ice) fishing (Quebec residents), and salmon fishing. Generally, non-residents are most interested in caribou hunting, black bear and combined black bear with woodcock hunting, salmon, walleye, and pike fishing. The resident market mostly targets caribou and moose hunting, deer hunting on Anticosti Island, and speckled trout fishing.

Markets identified to be declining include general resident fishing (other than resident winter fishing), deer hunting (non-residents) and salmon fishing (on Anticosti Island.)

Other market trends in Quebec are an increase in archery, pheasant hunting, "put and take" fishing, and an increased demand for dog sledding.

In terms of complementary markets, the outfitting industry in Quebec is finding

- an increased demand for family-oriented activities such as swimming and other water-related activities, as well as rural "country" areas and snowmobiling. Some of Quebec's outfitters are meeting the demand for these non-consumptive markets.

Another interesting trend in Quebec is that there are an increasing number of Natives and Europeans who are establishing outfitting operations in the province.

Regulations

Outfitters are required to be licensed by Quebec's Ministère du Loisir, de la Chasse, et de la Pêche (provincial Minister of Hunting and Fishing). Licensed outfitters are required by provincial law to provide accommodations. Additionally, the Ministry may lease to outfitters the exclusive rights to hunt, fish, or trap the resources on provincial public lands. This lease provides the outfitter with the exclusive right to hunt and fish in that territory.

Guides are not required to be licensed in the province of Quebec.

Fishing regulations regarding gear, bait etc. apply in each of the 25 different regional Fisheries Management Zones in Quebec. Some outfitting operations have exclusive use of water although the required use of guides is limited to those waters north of the 52nd parallel of latitude. 40% of the non-resident fishermen use outfitting operations, wildlife reserves, or ZEC's.

Problems pertaining to the regulations in Quebec include a need to simplify the regulations and subsequently reduce their administrative burden.

Sample Packages

Exhibit IV-5 present a sample of Atlantic Salmon/Landlocked Salmon and Bass fishing packages, as well as black bear and white-tailed deer hunting packages. Of all products, salmon and black bear packages command the highest price, with packages ranging anywhere from a $700 for a 7 night, combined hunting (bear) and fishing package, to $4498 for a comprehensive 6 night package including a guide, meals, transportation to the hunting and fishing areas, boats, and maps.

The average salmon angling package is priced between $2200-2800 for a 6 night stay, and usually includes accommodation in a lodge, a guide, meals, and a boat.

White-tailed deer hunting packages are priced at approximately $1500 for a 5 or 6 day hunt, while some bass fishing packages sell from $275-875 per person for a 6-7 day angling package (including accommodations and boat only).

EXHIBIT IV-5

QUEBEC FISHING PACKAGES - ATLANTIC SALMON and/or LANDLOCKED SALMON

ATLANTIC SALMON/LANDLOCKED SALMON FISHING PACKAGE FEATURES									
Operator	**Type of Package**	**Accom. Type**	**# Nights**	**Guide**	**3 meals**	**Transport-ation**	**Boat**	**Other**	**Price (per person)**
Anticosti Outfitters, Anticosti Island	F	Lodge	6	Y	Y				$2800
Auberge de la Riviere George, Kuujjuaq	F/H	Lodge	6	Y	Y	Y	Y	Maps, Return transportation from Montreal	$3550
Auberge Wedge Hills Lodge, Kuujjuaq	F/H	Lodge/Motel/Cabin	6	Y	Y		Y		$2695
Delay River Outfitters, Schefferville	F/H	Tent	6	Y			Y	Maps	$1500
Pourvoirie du Cerf-Sau, Anticosti Island	F	Lodge	6	Y	Y	Y		License, 4WD Vehicle	$2200
Tuktu Hunting & Fishing Club, Schefferville	F	Lodge/Cabin	6	Y	Y	Y	Y	Vehicle	$2640
Jack Hume Adventures, Schefferville	F/H	Lodge	6	Y	Y	Y	Y	Parking in Montreal, Maps, Caribou license	$4498
Club Chambeaux, Fermont	F	Cottage	5-6	Y	Y	Y	Y	Maps	$1895
Pourvoirie du Caribou Adventure, Parent	F/H	Cabin or shelter	7	Y	Y	Y	Y	Maps, Radio Communic.	$1590
Safari Caribou du Nouveau-Quebec, Kuujjuaq	F/H	Cabin/Tent	7	Y	Y	Y	Y	Hunting license, maps	$2925
Reserve de la Petite Nation, Montebello	F	Cottage	5				Y	License, Maps	$525

EXHIBIT IV-5 continued
QUEBEC HUNTING PACKAGES - BLACK BEAR

BLACK BEAR PACKAGE FEATURES									
Operator	**Type of Package**	**Accom. Type**	**# Nights**	**Guide**	**3 meals**	**Transport-ation**	**Boat**	**Other**	**Price (per person)**
3 Seasons Camp, Kipawa	F/H	Cottage/Camp	7			Y	Y	Maps, Bait	$700
Air Melancon, Mont-Laurier	H	Cottage	7			Y	Y	Maps	$875
Arctic Adventures, Kuujjuaq	H	Cabin/Camp	5	Y	Y	Y	Y	Maps	$3937
Auberge de la Gatineau, Maniwaki	H	Cottage	7				Y		$695
Chalets Diane, Kipawa	H	Cottage	7						$360
Le Domaine Lounan, Mont-Laurier	F/H	Cottage	1 (per day rate)		Y		Y	Leisure activities	$130
Auberge de la Riviere George, Kuujjuaq	F/H	Lodge	6	Y		Y	Y	Return transportation from Montreal	$1875 (min 6)
Auberge Wedge Hills Lodge, Kuujjuaq	F/H	Lodge/Motel/Cab in	6	Y	Y	Y	Y	Butcher services	$2695
Jack Hume Adventures, Schefferville	F/H	Lodge	6	Y	Y	Y	Y	Maps, parking in Montreal, all ground transp.	$4498

EXHIBIT IV-5 continued

QUEBEC HUNTING PACKAGES - WHITE-TAILED DEER

WHITE-TAILED DEER PACKAGE FEATURES									
Operator	Type of Package	Accom. Type	# Nights	Guide	3 meals	Transport-ation	Boat	Other	Price (per person)
Anticosti Outfitters, Anticosti Island	H	Cottage	5	Y				Maps, 4WD vehicle	$1350
Pourvoirie du Cerf-Sau, Anticosti Island	H	Lodge	6	Y	Y			Maps, License, 4WD vehicle	$2000
Reserve de la Petite Nation, Montebello	(Bow) H	Cottage	5	Y			Y	Maps, License	$1175
SEPAQ Anticosti, Anticosti Island	H	Lodge	5	Y	Y			Maps, 4WD vehicle, Truck	$1550

EXHIBIT IV-5 continued
QUEBEC FISHING PACKAGES - BASS

BASS FISHING PACKAGE FEATURE FEATURES									
Operator	Type of Package	Accom. Type	# Nights	Guide	3 meals	Transpor t-ation	Boat	Other	Price
Pourvoirie du Lac Saint-Pierre, Saint-Ignace-de-Loyola	F	Cottages	6				Y	Gas, Motor	$275/person (min 2)
Quebec Wildemess Outfitters, Lake des Quinze	F/H	Cabin	7	Y				Maps	$750/person (min 2)
La Reserve Beauchene, Temiscaming	F	Cottages	7				Y	Gas, Maps, catch & release	$1750 (for 2)
Reserve de la Petite Nation, Montebello	F	Cottages	5				Y	Motor, Gas, License, Maps	$525/person (min 4)

NEWFOUNDLAND

Newfoundland and Labrador, the eastern most Canadian province, competes directly with New Brunswick for Atlantic salmon, brook trout, moose, and black bear.

Primary Resources

In terms of resources, Atlantic Salmon is the most sought after species in Newfoundland, followed by Brook Trout. Other key fishing species in order of demand are lake trout, arctic char, northern pike and landlocked salmon. The main big game hunting species are moose, followed by caribou and black bear in order of demand.

The black bear hunt in particular is increasing in popularity, largely due to a high kill success rate and the trophy size of bears. Newfoundland is beginning to have success with the Spring black bear hunt which has become popular in North America in the last few years. These hunts are baited hunts and thus have a high success rate. Spring bear hunts in the province sell for some $1500 per week, which is higher than the prices of bear hunting in other areas.

Outfitting Industry

The provincial department of Tourism and Culture, Outdoor Product Development Section, oversees the hunting and fishing sector in Newfoundland and Labrador. Additionally, there is an outfitter association in Newfoundland and Labrador respectively. Both associations represent the industry, oversee activities, and lobby on behalf of the industry in terms of fee changes, licence changes, etc.

Trends

Although national trends indicate a decline in the number of hunters, Newfoundland is experiencing a growth in its hunting and fishing industry, largely due to the growing reputation of the region, the high kill/catch rates, and the trophy quality of the resources.

Big game hunting in particular, has been increasing in recent years. Revenues increased by 22% in 1991 over 1990 levels, and a further 30% in 1992. Indications are that the 1993 hunting season is following this trend. The increase

in big game hunting is felt to be largely in response to increased promotional efforts on behalf of the Department of Tourism and Culture, as well as a recent concerted effort in upgrading outfitter facilities.

The sports-fishing sector is also increasing in Newfoundland but less significantly. The most prominent increase is in the Atlantic Salmon fishery, which has been growing both in resource populations and market demand as a result of the closure of the Newfoundland commercial salmon fishery in 1991. The province now has some 176 scheduled salmon rivers.

Regulations

In terms of regulatory issues, all outfitter accommodations are annually inspected for comfort and cleanliness and licensed by the Department of Tourism and Culture. Guides also require licensing, which is administered by the province's Wildlife Division.

In Newfoundland, non-resident big game hunters must book through an outfitter by law. Non-resident anglers require a guide **or** an outfitter.

The requirement to utilize a fishing guide in Newfoundland was established in 1990 to create employment and has assisted conservation efforts in that anglers are more inclined to follow catch regulations and daily limits due to the presence of a licensed guide.

Markets

The Newfoundland hunting market is comprised of ⅔ U.S. and ⅓ Canadian. The fishing market is converse to this with ⅔ Canadian and ⅓ U.S.. A small European market of about 3% exists in both the hunting and fishing sectors.

Sportsmen are demanding a higher level of quality in every area, including lodging, food, and guide service. Anglers, who tend to be more affluent than hunters, generally prefer more upscale properties than their counterparts although hunters are now beginning to look for better facilities as well.

In addition to variances in the markets for fishing and hunting, there are regional variances in demand. For example, the U.S. hunting market tends to be more upscale than their Canadian counterparts, as they prefer better quality properties

and spend more money. The Canadian hunting market to Newfoundland is comprised of mostly Atlantic Canadians and Quebecers who do not demand this level of quality.

In terms of the angling market, again the U.S. market tends to be more of an upscale market than the Canadian angling market, travelling a further distance to Newfoundland and willing to pay higher prices for sports-fishing opportunities.

Another interesting trend is that the U.S. fishing market is receptive to hook-and-release fishing, whereas Canadian anglers want to retain all catch. However, it has been indicated that providing an option is essential. For example, U.S. fishermen are discouraged from coming to Newfoundland if they are limited to hook-and-release fishing, but will usually opt for releasing all catch when given the option of keeping even one fish. This trend is also being found with the Japanese market who are receptive to hook-and-release angling if they are permitted to retain one fish.

In the European market, there is evidence that Germans are willing to pay high prices for big game hunting trips. These trips tend to be extended hunting excursions of some 8, 10, 12, or 14 days, commanding prices between $5000 and $7000 per hunter.

Marketing efforts by the Department of Tourism and Culture for the hunting and fishing sector have been fairly proactive in the last few years. Most of these efforts have been directed at the North Eastern U.S., although the Department is extending marketing efforts into the southern and mid-western U.S., as well as into the U.K. and Japan. The mid-west (i.e. Montana, Wyoming, Nebraska) are seen to have high participation rates in hunting and fishing activities. However, this market has been difficult to target since they traditionally travel north to Alberta and Ontario. Texans have also been identified as a strong hunting market who will travel the distance for a hunting experience in Newfoundland.

Opportunities

Many outfitters in Newfoundland offer upland game bird hunting when asked, but do not generally promote them. The Department of Tourism and Culture has identified spruced grouse, ruffed grouse, and ptarmigan to be an untapped hunting resource, especially given the strong, upscale market which exists in the North Eastern U.S. for upland bird hunting. These hunters are a driving distance from

Atlantic Canada and some will bring their own hunting dogs, thereby providing outfitters un-equipped with dogs and kennels an opportunity to tap into this market. Current marketing efforts of the Department are being increased to promote upland bird hunting in Newfoundland.

In terms of soft adventure, many of the more upscale, year-round lodges are doing quite well with snowmobilers (resident market), weekend getaways, wilderness hiking, etc. However, the "true" non-consumptive market has not been found to stay in a hunting and fishing lodge. The in- and off-season markets for these lodges tend to be predominantly the hunting and fishing markets. These sportsmen tend to bring their families and participate in other nature-related, non-consumptive activities (i.e., during the off-season for hunting or fishing, or as add-ons to hunting and fishing trips). The successful lodges in the off-season are full service lodges which offer many amenities.

Sample Packages

Newfoundland salmon and black bear hunting packages sell for some $1000-3500 for a 7 day package usually including accommodations, a guide, and meals. Exhibits IV-6 and IV-7 illustrate several black bear hunting and salmon fishing packages.

LABRADOR OUTFITTING INDUSTRY

In Labrador, the hunting and fishing sector is not experiencing the same growth as Newfoundland. Revenues in recent years have actually fallen in response to the economic recession, and the fact that Labrador relies most heavily on the North Eastern U.S. market. Due to the remote location of Labrador (and high cost of access), hunting and fishing packages tend to be of a higher price - $2000-$3000 per week. The higher price of Labrador's hunting and fishing product has caused the region's outfitting industry to suffer more as a result of the economy.

Regulations

In Labrador the regulatory environment is more stringent than in Newfoundland. Non-resident big game hunters must book a hunt through an operator as in Newfoundland, but sports-fishermen must also book through an outfitter. The stronger regulations in Labrador are due to the recognition of Labrador's world class product and the necessity to sustainably manage and conserve it.

EXHIBIT IV-6

NEWFOUNDLAND HUNTING PACKAGES - BLACK BEAR

BLACK BEAR HUNTING PACKAGE FEATURES.								
Operator	**Accom. Type**	**# Nights**	**Guide**	**3 meals**	**Transport-ation**	**Boat**	**Other**	**Price[1]**
Aides Lake Salmon Lodge, Aides Lake	Lodge	Week	Y	Y	Y	Y		$1500 US
Beaver Lodge, Gander River	Lodge	Week	Y	Y	Y			$1200 US
Conne River Outfitters, Conne River Pond	Lodge	Week	Y	Y	Y	Y	License	$1500 US
Cow Head Outfitters, Cow Head	Lodge	Week	Y	Y	Y		Radio telephone	$1400 Cdn
Cross Pond Lodge, Cross Pond	Lodge	Week	Y	Y	Y	Y	Air transportation from Boston or Montreal, one guide/hunter	$2900 US
Hideaway Lodge, Rowsell's Brook	Lodge	Week	Y	Y	Y		License fees	$1000 Cdn
Mt. Peyton Outfitters, Frozen Ocean Pond	Lodge	Week	Y	Y	Y		Smoke house, mobile telephone	$1605 Cdn
Owl's Nest Lodge, Hinds Lake	Cabin	week	Y	Y	Y	Y	Sauna, games room, vehicles	$2000 US

[1]Package price is for single animal hunts only. Variable pricing on combination and multi-animal hunts.

EXHIBIT IV-7

NEWFOUNDLAND FISHING PACKAGES - ATLANTIC SALMON/LANDLOCKED SALMON

ATLANTIC SALMON/LANDLOCKED SALMON FISHING PACKAGE FEATURES								
Operator	**Accom. Type**	**# Nights**	**Guide**	**3 meals**	**Transit to Site**	**Boat**	**Other**	**Price**
Aides Lake Salmon Lodge, Aides Lake	Lodge	5 days	Y	Y	Y	Y	Air transportation from Boston or New York, helicopter to site	$2250 US
Beaver Mountain Lodge, Great Rattling Brook	Lodge	Week	Y	Y				$1000 Cdn
Bill Bennett, Sitdown Pond	Lodge	5 days	Y	Y			Housekeeper	$750 Cdn
Cal's Hunting & Fishing, Granite Lake	Lodge	Week	Y	Y	Y		Radio telephone, one guide/client	$1200 Cdn
Conne River Outfitters, Conne River	Lodge	Week	Y	Y	Y	Y	Fly-in, one guide/client	$1500 Cdn
Eagle Mountain Lodge, Main River	Lodge	Week	Y	Y	Y		Float plane access	$3500 Cdn
Grey River Lodge, Grey River	Lodge	5 days	Y	Y	Y			$2000 Cdn
Ray's Hunting & Fishing Lodge, Sandy Lake	Lodge	Week	Y	Y	Y	Y	License, Airport pickup	$2000 US
Central Newfoundland Outfitters, Great Rattling Brook	Lodge	1		Y			Dining room, lounge, private bath/room	$150/day Cdn

SECONDARY COMPETING JURISDICTIONS

The secondary competing regions to New Brunswick have been identified as Ontario, Alberta, New Hampshire, New York, and Scotland.

ONTARIO

Southwestern Ontario competes with New Brunswick mainly for brook trout, while northern Ontario competes for bear, moose, and deer. Ontario's primary competing fishing resource is considered to be the brook trout.

Primary Fishing Resource

Brook Trout

The Lake Nipigon region of western Ontario is world-renown for trophy brook trout fishing. These fish are locally known as "coasters". They are similar to sea run trout in that they use the rich forage base of Lake Nipigon and Lake Superior, and achieve very rapid growth rates. Lake Nipigon is commonly referred to as the sixth Great Lake. It is 40 miles long, 60 miles wide, and in excess of 500 feet deep. The coaster stocks are strongest in Lake Nipigon. The fish move into lake tributaries to spawn and occasionally to feed. The stocks are very long lived, and therefore individual fish achieve a very large size, growing one pound per year or more. They are fished both in the lakes and in the tributary streams. Those targeted by the angler are from 5 to 8 pounds in weight. The eastern part of the region also has smaller lakes in which trout in the 1 to 3 pound range are targeted, mainly by resident sportsmen.

Curiously, although the region is known for its trophy brook trout, and more recently for its huge togue, American non-resident visitors to the region principally fish for walleye and northern pike. A rough estimate is that only one quarter of the non-resident Americans fish for trout. Most of the Canadians and European sportsmen target coldwater species.

The fishery in the lakes is conducted mainly by spin casting in the shallows of the shoreline. Some trolling is also conducted, and there have been proposals to designate some river sections as fly fishing only. The season lasts from January 1 to September 15, although there is no ice fishery on the big lakes for trout. There are ice fisheries on the small inland lakes. The fishery is at its best from ice-out until August when catch rates decrease. Since the trout move to spawning areas in early September, there is a proposal to close the season on the first Tuesday after Labour Day. On the coaster stocks there is an 18" minimum length

limit in-place. This allows fish to spawn twice before they enter the fishery. Both sexes mature as two year olds (II+), and Lake Nipigon brook trout live to VII or VIII. There is a two fish possession limit on lake Nipigon brook trout. There is no private water in the lake Nipigon region.

Much of the fishing for trout by non-residents is conducted from guided charter boats. These vessels are 40 to 50 feet in length, and are really floating lodges that remain in water for several days. Fishing is conducted from 14' boats that are transported aboard the large vessel. There are thirteen such operators on Lake Nipigon.

Recently, daily guided trips to fish the recently discovered suspended (off-bottom, mid-water) togue populations of lake Nipigon has become popular. These fish are very old (35+) and very large (35 lb+). Currently regulations being rushed into effect to limit the killing of these fish, as the population is undoubtably very vulnerable to over-exploitation.

Management of the coaster populations is through regulation of catch only. Recently there has been an ecological change in Lake Nipigon with the introduction of smelt. This was not done on purpose, and there was concern that it might affect growth rates. However, the trout are using smelt as forage, and there has been no noticeable changes in growth. On the smaller interior lakes, there is hatchery stocking of the lake Nipigon strain of trout. This is done for population maintenance, range extension, and put-grow-and-take purposes. The Ministry of Natural Resources is constantly surveying new lakes in an attempt to find barren lakes. When stocked, these lakes often produce rapidly growing trout. Occasionally brood stock fish from the regional hatchery are used for near-urban put-and-take fisheries.

The only habitat manipulation that has been attempted has been to install spawning gravel for trout on groundwater sites to provide upwelling spawning areas. This has been attempted only recently, and it is thought to have been successful. Recently the use of live bait has been banned because of bait bucket stocking of minnows, perch and smelt. Yellow perch and white suckers are very deleterious to a trout population. There is no water fertilization of lakes attempted in the region because it is already very fertile. Reclamation of lakes to remove coarse fish populations has been banned in Ontario.

The goal of brook trout management in New Brunswick, if the western Ontario situation is to be followed, should be to produce trophy fish for promotion of non-resident angling. In New Brunswick this might be possible with lake fertilization, forage manipulation, and the introduction of a long-lived, rapidly growing stock

like the Lake Nipigon variety of brook trout. The Ontario Ministry of Natural Resources has produced a catalogue of their available sport fish strains. Perhaps one or several would be ideal for the New Brunswick situation. The introduction of non-native strains of trout has been tried with the Assenica trout of northern Quebec. These introductions have been very successful, and perhaps the Lake Nippigon strain or a similar one would have even better success. Another suggestion would be to use splake (Brook trout X Togue) in brook trout situations. These fish are very long-lived, and have growth rates similar to that of a brook trout.

Outfitting Industry

Ontario's outfitting industry is comprised of some 1400 lodges who directly depend on fishing and/or hunting as the mainstay of their business. Although generally few operations are open year round, the majority of these are located in close proximity to urban areas and offer ice fishing and cross-country skiing in the winter.

Regulations

Non-resident fishing and hunting licenses are required in Ontario with fees varying depending on the origin of visitor - visitors from other provinces pay less that visitors from the United States. Both seasonal and 7-day fishing licenses are available for non-resident, and both categories also have a conservation license whihc is a lesser price and also has lower catch limits. Ontario also has a spousal license which is basically a fishing license for the entire family. Hunting licenses are required for each species hunted.

Guides are not required by non-resident anglers, nor by non-resident deer hunters. However, non-residetn moose and bear hunters are required to stay at a licenses outfitters and to take a guide with them when hunting.

Bear hunting is regulated through the Ministry of Natural Resources with outfitters required to obtain a license which give them exclusive control over an area for non-resident hunting. The Ministry also regulates the availability of non-resident moose tags as a resource management technique. Businesses in operation as of 1987 were allocated shares in proportion to their historical non-resident moose hunt. The Ministry determines the harvest permitted in each area and allocates tags to the outfitter in proportion to their shares. New outfitters wishing to get into the deer hunt can apply for shares (which are not likely to be available), purchase shares from an existing operation or purchase shares from an outfitter going out of business.

Guides are not required by non-residents anglers, although obtaining such services for fishing the large lakes is popular.

Sample Packages

Exhibits IV-8 and IV-9 present a sample of salmon fishing and general fishing (including smallmouth bass) packages. Although there are numerous outfitter packages to choose from in the province, this small sample highlights the general price range. Salmon packages including accommodations for 7 nights range in price from $570-925 per cottage and generally include the provision of a boat. More comprehensive salmon angling packages including meals sell for approximately $600 per person for one week. Many Ontario properties provide dock service and gasoline in the package price.

General fishing packages sell approximately the same price as salmon packages, ranging from $630-1200 per cottage.

ALBERTA

The Alberta outfitting product is markedly different than that of New Brunswick due to terrain and species availability. Big game species include black bear, elk, moose, white-tail and mule deer. Angling species in Alberta include brook trout, northern pike, walleye, and many others.

Resources

In terms of species, Alberta is most known for its trophy white-tailed deer. Other big game species include antelope (which have recently become available to non-resident hunters), bighorn sheep, moose, black bear, mule deer, cougar, and coyote. Only Albertan residents are permitted to hunt grizzly bear. The majority of non-resident hunters hunt for big game (mostly moose, white-tailed deer, and black bear), although there are some which hunt birds and combination hunts.

Outfitting Industry

In Alberta, outfitters provide services and equipment for big game hunting as well as for other outdoor activities. The Professional Outfitters Association of Alberta (POAA) serves the province's hunting-based outfitters.

There are some 260-270 outfitters in the province, including hunting, fishing, and trail ride outfitters. Approximately 210 of these are registered hunting outfitters, of which the majority are big game outfitters offering mule deer, white tailed deer,

EXHIBIT IV-8

ONTARIO FISHING PACKAGES

SPECIES	FISHING PACKAGE FEATURES								
	Operator	Accom. Type	# Nights	Guide	Meals	Transport-ation	Boat	Other	Price
Salmon (outfitters offer several species including salmon)	Driftwood Cove, Port Severn	Cottages	7				Y		$875-925/ cottage
	Harbourview Motel & Marina, Brighton	Motel	4	Y	3 break-fasts			Daily maid & dock service	$118/person, dbl occ.
	Green Bay Resort, Cloyne	Resort/ Cottages	7				Y	Daily maid & dock service, Gas	$570/cottage
	Millhaven Inn & Fishing Charters, Bath	Inn/ cottages	1				Y		$485/cottage
	Glenn-Burney Lodge & Motel, Parry Sound	Lodge/ motel	7		7 break-fasts 7 lunches		Y	Daily maid & dock service, Maps, Leisure activities	$605/person
	Lauzon Aviation, Blind River	Outpost Cabins	7				Y	Sauna, License, Maps, Motor, Gas	$500/person
	Melwel Lodge, Thessalon	Cottages	7		All meals			Dining room, Beach, Leisure activities, Daily maid & dock service	$659/person/ dbl occ.
	Lakeside Resort & Trailer Park, Hawk Junction	Outpost Camp/ Cottages	7				Y		$250/person (min. 4)
	Parker's Motel & Cottages, Iron Bridge	Motel/ Cottages	7 (sleeps 2)				Y	Daily dock service, Gas	$630/cottage

EXHIBIT IV-9
ONTARIO FISHING PACKAGES

GENERAL FISHING (including Smallmouth Bass) PACKAGE FEATURES								
Operator	**Accom. Type**	**# Nights**	**Guide**	**Meals**	**Transport-ation**	**Boat**	**Other**	**Price**
Stanton Airways, Port Stanton	Outpost Camp	3			Y	Y	Motor, Gas	$175/person dbl occ.
Bayview-Wildwood Resort, Port Stanton	Resort/ Cottages	4		4 breakfast 4 dinner		Y	Daily maid service, Motor, Gas, Map	$498/person dbl occ.
Southview Cottages, Baillieboro	Cottages (sleeps 4)	7				Y	Motor	$630/cottage
Loon Lake Lodge, Cloyne	Cottages	6		6 breakfast 5 lunch 6 dinner		Y	Daily maid & dock service, Motor, Gas, License	$580/person dbl occ.
Riverside Lodge, Sturgeon Falls	Cottages (sleeps 4)	7				Y	Dock service, Motor	$909/cottage (incl. taxes)
Whitesea Cottages & Charters, Meldrum Bay	Cottages (sleeps 4)	2					½ day fishing charter	$575/cottage
Timberland Lodge, Mindemoya	Cottages	7		7 breakfast 7 dinner	Y	Y	Maid & dock service, Motor, Gas, Bait, License	$725/person
Fishland Camps, Elliot Lake	Outpost Camp	7			Y	Y	Motor, Gas, Bait, License, Maps	$400/person (incl. taxes) (min 3)
Frontier Lodge, Elliot Lake	Outpost Camp	7				Y	Linens, Motor, Gas	$343/person
Argyle Lake Lodge, Matachewan	Cottages	7		7 breakfast 6 lunch 7 dinner		Y	Motor, Gas, Bait	$490/person
Garden Island Lodge, New Liskeard	Cottages	7	Y	7 breakfast 6 lunch 7 dinner	Y	Y	Daily dock service, Motor, Gas, Bait	$655/person dbl occ.
Canada North Lodge, Ear Falls	Cottages/ Rooms/ Outpost Camp	7	Y	All		Y	Daily maid & dock service, Motor, Gas, Bait	$1275/person dbl occ.
Hawk Lake Lodge, Kenora	Cottages	7		7 breakfast 6 lunch 7 dinner	Y	Y	Maid & dock service, Motor, Gas, Bait, License	$1695/person dbl occ.
Temple Bay Lodge, Eagle River	Cottages	6	Y	All	Y	Y	Maid & dock service, Motor, Gas, Bait, License	$1269/person dbl occ.

and moose. Additionally, there are some 1,800 licensed guides who can be employed by the outfitters, and 600 Class C licensed guides[4] (1991).
In addition to the POAA, there are a other outfitter associations in the province including the Alberta Outfitters Association. This association is a broader-based organization comprised of mainly non-consumptive outfitters providing trail riding, nature walking, etc. Other outfitter associations include the Bow River Angling Outfitters Association, and the Alberta Fly-in Fishing Lodge Operators Association.

The nature of the Alberta hunting experience i.e., mountain trekking for bighorn sheep, as well as the existing prohibition against establishing permanent base camps on Crown land (67% of outfitters hunt on Crown land) somewhat precludes cabin or lodge base camp accommodation. As a result, the Alberta outfitted hunting industry tends to lack the more "high end" type of accommodation, with the majority using tent or trailer accommodations.

Trends

In general, the outfitting industry in Alberta is remaining fairly stable although it has declined somewhat in recent years due to the economic recession, a lower number of resident hunters, decreasing habitats and animal populations, and declining participation rates.

However, demand for bighorn sheep and white-tailed deer has increased somewhat in recent years - bighorn sheep are considered a "high ticket" species among hunters.

Other pressures on the Alberta outfitting industry include the trend of taking shorter vacations closer to home, and the existence of significant hunting and fishing competition throughout the world. However, Alberta has some relatively unique species which are not offered in many other areas, such as the antelope and bighorn sheep.

As a result of the decline in hunter participation, the number of outfitters and licensed guides in Alberta has generally declined over the last ten years. The only

[4]A Class C guide is an Albertan resident who obtains a special license in order to guide friends and relatives hunting big game for recreational purposes. The Class C guide can not receive compensation for his/her guiding services.

growth has occurred in the number of Class C guides, which has risen steadily since 1986.

Another trend in the last few years has been the decline in the number of non-resident alien (i.e., non-Canadian) hunters to Alberta. This number has dropped 33% overall since 1986.

The non-resident big game hunting industry generated some $11.6 million in 1991. Non-resident bird hunters spent a total of $676,000 in the province in the same year. A further $757,000 was generated by outfitters who provided non-consumptive activities including trail rides and photography.

Approximately 17% of hunting outfitter camps also provide fishing opportunities, with another 21% providing trail rides or pack trips (1991). Approximately half (51%) of the outfitters also offer soft adventure activities including hiking and river rafting (1991). However, hunting is the mainstay for the industry and guided hunting provides over 90% of the outfitting income (1991).

Average expenditures for U.S. big game hunters in 1991 was over $4,000 per person/trip, whereas bird hunters spent some $1,000 per person/trip (most bird hunters did not utilize outfitters). The average total expenditures of non-resident hunters in Alberta was some $5,526 in 1991, of which a breakdown is indicated in Figure IV-1.

Regulations

Alberta is divided into wildlife management units, and each area has a limit on the number of non-residents which are permitted to hunt big game.

All big game hunts of non-residents must be booked and contracted through an outfitter.

The Alberta hunting outfitter industry is considered to be highly regulated. Non-resident aliens (non-Canadians) must hire an outfitter to hunt big game, while other Canadians (non-residents of Alberta) have the option of hiring an outfitter or using a Class C Guide. Resident Alberta hunters, on the other hand, are not required to utilize an outfitter.

The total number of available hunting licenses is distributed among resident, non-

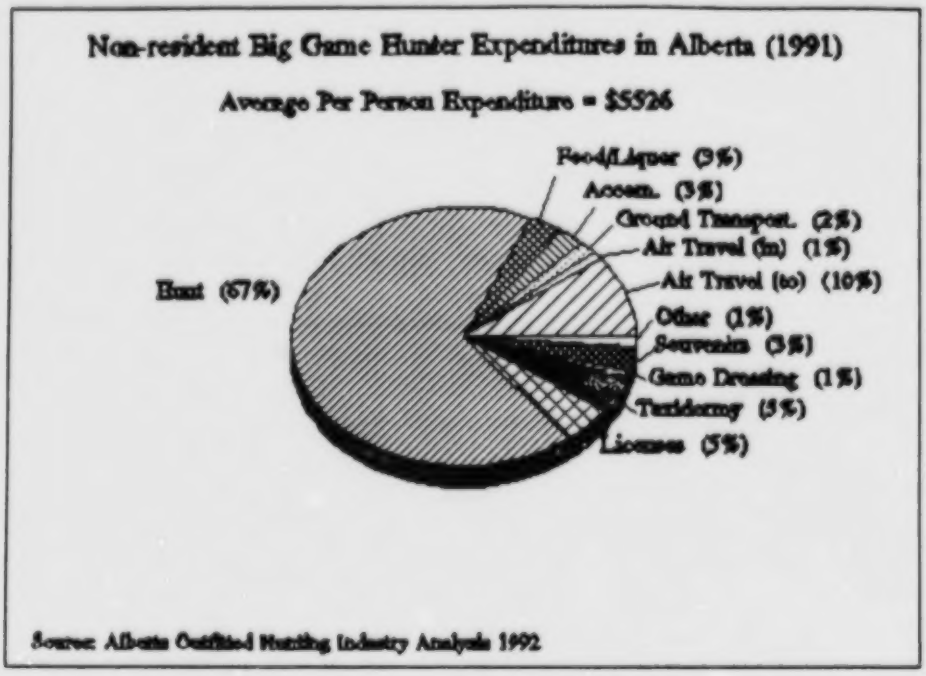

Figure 1 Non-resident Big Game Hunter Expenditures in Alberta (1991)

resident (other Canadian), and non-resident alien hunters, with resident hunters having the priority in obtaining hunting licenses. In 1991, 97.5% (212,781) of the hunting licenses were obtained by Alberta residents. Resident hunters tend to hunt in close proximity to their homes and do not utilize outfitters to a large extent.

All hunters are required to purchase a wildlife certificate (WLC). Individual licenses for the hunting of specific animals in particular locations are also required.

In the case of non-resident aliens, a licensed hunter also requires an "allocation" (whereby an allocation represents one hunting "opportunity" for a potential client) from an outfitter. In this context, outfitters are required to have allocations[5] (one

[5]Allocations are only available to *licensed* outfitter-guides.

allocation per hunter license) for the big game hunts they intend to sell. Although previously obtained by sealed tender, allocations are now auctioned to outfitters. In 1993, these allocations were made valid for 5 years, with an option of renewal for another 5 years. Preliminary results from this process indicate that the 5 year allocation process will enable outfitters to better plan for the future and to make more informed investment decisions.

Outfitters often offer secondary species to big game which do not require allocations, such as bird, coyote, or wolf hunting, or fishing.

All big game outfitters are required by law to be licensed, bonded, and have liability insurance. This license involves a written exam, at least one year's experience as a guide, and qualifications in first aid. Outfitters are also responsible for hiring staff (guides, cooks, etc.).

Although bird hunting outfitters are currently not required to be licensed, this is planned to be implemented in the near future.

All guides must be licensed by government. In addition to Class C guides, there are two other types of guide licenses. Class A and Class B guides must be employed by an outfitter in order to escort non-resident big game hunters. In terms of outfitters, there are two permit designations which apply. "S" permits allow the outfitter to offer all available big game species, where as "T" permits allow for all available big game species except bighorn sheep.

To date fishing lodges do not require licensing. (The outfitted fishing sector is much smaller than the hunting sector in the province).

These regulatory regimes have been in place for a number of years and there is apparently no difficulty in implementing them.

In terms of hunting motivations, a report conducted by the Exceleration Corporation (1992), determined that hunters in Alberta did not place the success of the kill as the primary source of trip satisfaction. The top sources of trip enjoyment ranked by the hunters were scenery and friendly people. The second most important factors were the skill and professionalism of the outfitter, followed by the actual hunting experience.

Markets

Of the U.S. market, over 63% of the big game hunters are males in management or professional occupations and earning middle to upper incomes. In comparison, the U.S. bird hunter has been found to be from more "universal" sectors and having incomes in the middle income range.

The average hunt lasts 7 days, with a minimum of 2 additional days spent in Alberta other than for the hunting trip. The average hunting trip is booked more than a year in advance, and nearly half (48%) of the hunters are repeat customers (Exceleration Corporation, 1992).

The non-resident markets for the Alberta hunting/fishing product are the U.S., Europe, Asia, and rest of Canada. The vast majority of the outfitted hunting clientele is from the United States (79%), with 13% from Europe, 6% from other Canadian provinces, and 2% from other overseas countries. The origin of the non-consumptive markets is largely Canadian, with approximately half being Alberta residents. The remainder come mostly from B.C. and Ontario.

Opportunities

The high seasonality of outfitting, which is mostly concentrated in the fall (although the cougar season runs from December to February and there is a spring as well as a fall black bear season), offers the Alberta outfitting industry ample opportunity to provide extensive non-consumptive wilderness experiences during the summer season.

Bird hunting has been identified as an opportunity for future development in Alberta, primarily from the Northwestern U.S. market. Additionally, guided fishing could be a potential source of revenue for the outfitted hunting industry, as well as the diversification into more soft adventure experiences including hiking, hunter training, canoeing, kayaking, wildlife viewing, and other wilderness trips.

The European hunting market, although a small one for Alberta, is perceived to be a growing market although it is considered to be sensitive about the nature of hunting and thus marketing efforts in Europe are conducted with care.

Sample Packages

Exhibit IV-10 illustrates some general fishing packages available in Alberta. Comprehensive, 7 day fishing trips including accommodations, guide, meals, transportation to site, and boat sell for some $1,000-1,500 per person, double occupancy. In these full service packages, all elements are included such as gasoline, motor, nets, and other add-ons such as airport transfers. Shorter fishing trips of some 3 days sell for approximately $1100 (for 3 persons) to $1150 (per boat).

NEW HAMPSHIRE

Primary Fishing Resource

Landlocked Salmon

The landlocked salmon is the primary freshwater sport fish in New Hampshire with brook trout #2. All fishing is done in lakes, the major ones being Lake Winnipasaukee, Lake Ossipee, Squam Lake, Sunapee Lake, and Conway Lake. There are smaller lakes in production also. The open season for landlocked salmon is from April 1 to September 30. Most fishing is conducted by trolling streamer flys and hardware. The general minimum length limit is 15", and on Squam Lake there is an 18" limit to promote a low yield/high quality trophy fishery. Fishing effort is very high on the New Hampshire landlocked salmon. Catch per unit effort is in the order of 1 fish caught per 20 hours.

There is a limited outfitting industry for landlocks in New Hampshire. Most of the shoreline of the larger lakes is tied up by resident and non-resident camp owners. There are two outfitters on Squam Lake, and four on Lake Winnipasaukee. There are also licensed guides in New Hampshire.

New Brunswick with its lower angler participation rates compared with New Hampshire, should have an advantage in selling opportunities to fish this species. However, New Hampshire has an advantage in being closer to the landlocked salmon angling customers of the Northeast. New Brunswick's selling points should be a better catch rate with more "elbow room" in a relatively wilderness environment.

EXHIBIT IV-10

ALBERTA FISHING PACKAGES

PACKAGE FEATURES									
Operator	**Species Available In Package**	**Accom. Type**	**# Nights**	**Guide**	**Meals**	**Transport-ation**	**Boat**	**Other**	**Price**
Charles Lake Lodge & Tent Camps, Colin Lake	Lake Trout Northern Pike	Lodge (fly-in)	5			Y	Y	Motor, Gas, Plane	$450/person Min 3 taxes incl.
Tapawingo Lodge, Manning	Northern Pike Walleye Whitefish	Cabins (fly-in)	3			Y			$374 (based on 3 persons)
Eagle Eye Drifters, Calgary	Rainbow Trout Brown Trout	n/a	0	Y	lunch, beverages	Y	Y	Casting instruction	$220 US/day
Great Waters Alberta, Calgary	Rainbow Trout Brown Trout	n/a	0	Y	lunch	Y	Y		$300/day
Northwest Guide Service, Calgary	Rainbow Trout Brown Trout	Camping	3	Y	lunch	Y	Y	Rods, Reels	$1,150/boat
Winfred Lake Lodge, Conklin	General fishing	Lodge, Cabins	1		All		Y	Motor	$125/day
Caribou Mountain Wilderness, Caribou Mountains	Lake Trout, Arctic Grayling, Northern Pike, Walleye, Whitefish	2 Lodges	7		All	Y	Y	Motor, Gas, Nets, Side trips to Eva Lake	$1,050/pers on dbl occ. (min 4)
Namur Lake Lodge, Fort McMurray	Lake Trout, Walleye, Northern Pike, Arctic Grayling	Cabins	7		All	Y	Y	Motor, Gas, nets, return float plane, airport transfer, bedding	$1,525
Fort Chipewyan Adventure Lodge, Lake Athabasca	Pickerel, Northern Pike, Goldeneye	Lodge (fly-in)	3	Y	All	Y		Round trip airfare between Fort McMurray and Fort Chipewyan	$1,000/pers on dbl occ. (taxes incl.)
Currie's Guiding & Tackle Ltd., Jasper	General Fishing	n/a	0	Y	lunch	Y	Y	All equipment	$125/day $99/½ day

NEW YORK

Primary Fishing Resource

Smallmouth Bass

There have been three angler surveys conducted to determine angler preference in New York State since 1970, in 1973, 1976-1977 and 1988. In the 1973 survey, black bass, both smallmouth and large mouth were the preferred species grouping. There was no separation between smallmouth and large mouth bass in the survey. In the 1976-1977 survey, smallmouth bass were the preferred species, and large mouth were the second rated species. In 1988, the two bass species again were the most sought after with brown trout the third rated according to effort expended. If all salmonids were grouped, they would be more popular than bass.

The most popular angling rivers for smallmouth bass in New York State are the Saint Lawrence, Mohawk, Niagara, Susquehanna Rivers, and the most popular lakes are Lake Erie, Champlain, Ontario, Chautauqua, Lake George and Oneida Lake. New York State has 12,000 lakes and ponds, 20-30% of which have smallmouth bass populations.

Anglers target fish of any size greater than the 12" minimum size limit. There are all types of fisheries for smallmouth ranging from trophy fisheries through hook-and-release and moderate size/high yield. 30% of all legal-sized smallmouth bass caught in New York are released alive. This compares with 56% of largemouth which are released. The reason for this seems to be that live bait is used more for smallmouth, and bait fishermen seem to kill more of their catch. All methods are used to fish for smallmouth bass, the most popular of which is spin casting using artificial lures and bait. Also popular are bait casting, fly fishing in streams, and trolling.

The fishery for smallmouth bass opens on most lakes the third Saturday in June and lasts until the end of November. There are special fisheries on Long Island and in Lake Erie that are open during the spawning season when one bass of greater than 15" may be retained. The most productive portions of the season are at the start of the season until mid-July, and in September. Anglers generally do not fish very much in October. There are many other species of fish that often are sympatric (occupy the same water) as smallmouth bass. Their seasons may be open while the bass season is closed. Therefore, there is a by-catch of bass caught during their spawning season that must be released. Often anglers are actually targeting bass, although they will not admit this fact. The closed season for bass is therefore difficult to enforce. The daily limit for bass is five fish per

day, although there are several lakes with a trophy fish management strategy on which only three fish are allowed to be killed per day. There are two lakes with slot limits of 12" to 15". These are lakes with excess recruitment mainly of largemouth bass which are sympatric in these lakes. This is again a trophy fish strategy to reduce competition among medium-sized fish and promote growth into the trophy category. There is a special fishery in New York on a number of lakes where there is a winter fishery.

There are very few private waters in New York. In a recent court finding, there was a decision that if a waterbody was accessible by canoe (navigable), then fishing was permitted.

There is only an occasional requirement for bass produced in a hatchery. This happens in the few times that populations are eliminated during reclamation of lakes. Reclamation is lake poisoning done to eliminate coarse fish which severely limit sportfish production.

There have been small experimental attempts to improve smallmouth bass nursery areas, but these attempts have not resulted in broad management initiatives. There are management interventions to control drawdowns in a few New York Reservoirs. This is an attempt to protect young-of-the-year bass from being displaced from near-shore nursery areas.

In summary, New York has a very successful smallmouth bass fishery. This is partially due to the large amount of bass water, and a species diversity that prevents the bass resource only from being specifically targeted. There is a high degree of hook-and-release angling. Bass anglers have formed clubs that are active state-wide. New York's smallmouth bass populations are limited by a lack of recruitment, although not severely so. New Brunswick's populations are not limited by this factor, therefore the New Brunswick resource is comparable or better than that of New York based on its magnitude in comparison with the current demand.

New Brunswick is perceived as being on the frontier of smallmouth bass fishing. The resource is of excellent quality when compared with other jurisdictions such as New York. The resource will probably continue to be of excellent quality because of the ingrained philosophy of hook-and-release among bass anglers. Promotion of the bass fishery will, however, detract from the current state of the fishery where for the most part anglers have very little company while fishing.

Outfitting Industry

Regulations

New York State sets requirements for guides. There are, however, no requirements that non-resident sportsmen obtain the services of a guide. Many non-residents do hire a guide, particularly when fishing on the big lakes and streams. On the lakes, the guides are usually charter captains who mainly target salmonids. However, there is a large demand for guides on Lake Erie for walleye and bass, and on the Saint Lawrence River for muskellunge and bass.

SCOTLAND

Scotland is considered to be New Brunswick's remote competitor for Atlantic salmon.

Primary Fishing Resource

Atlantic Salmon

The Atlantic salmon is the most important sport fish in Scotland. Brown trout, both anadromous and resident are also fished.

The most important waterbodies are the Tay, the Spey and the Tweed. Like NB rivers, there are smaller grilse rivers and larger rivers which produce both salmon and grilse. A grilse is a fish six pounds or less, and a trophy salmon is a fish in excess of 20 lb.

The only technique that is used by salmon anglers is fly fishing although early in the year in the larger rivers such as the Tay, the fly is trolled. Trolling is conducted from late January through March. The salmon fishing season ends in October or November depending on the river.

A strong etiquette code governs salmon fishing in Scotland. Hotels and clubs may set daily creel limits, but it is not usually considered necessary. Where there is no daily bag limit, often 5 or 6 fish are kept in a day early in the season. Usually fish are released at the end of the season, particularly the females. There are no regulations regarding the live release of salmon such as those in New Brunswick.

Fishing success is variable depending on river and season and the experience of the angler. A good success rate is exemplified by the River Dionard where a catch per rod-day of 0.36 (67 fish in 186 rod-days) was recorded in July, 1993.

Often fishing success rates are far lower than this (A. Knight, personal communication). On the better beats on the larger rivers such as the Tay during prime time, catches as high as 8 to 10 fish per angler-day may be recorded.

There is very little open water in Scotland. The water is leased from aristocrat riparian owners by clubs, by hotels and by agents who dispense it on a fee-for-fishing basis. Prices range from $40 to $2,000 (Canadian) per day. There was an instance during the past summer when a person paid $6,000 for a day's fishing on a good beat in prime time on one of the major Scottish rivers. On the River Dionard which is a small grilse river one rod day costs $700 per day. It is obtained with one night's accommodation at the Cape Wrath Hotel. In the case of the Cape Wrath, the water, which is a 2.5 mile long beat, is rented from a lord for $16,000 per year.

Management interventions include smolt stocking programs where wild brood fish are stripped and their progeny raised in hatcheries. Just prior to smoltification, these fish are held in cages in the river and then released shortly afterward. This program has been very successful. On the River Dionard, such a program has been conducted for four years. Return to the angler has ranged from 7% to 9% which is incredibly good. Habitat improvement is also conducted in the rivers by the riparian owners. Techniques may include spawning gravel replacement if it is disturbed, boulder placement to provide juvenile habitat, and pool improvement both for the purposes of providing resting and holding water, and to provide opportunities for angling.

Salmon fishing in Scotland has recovered this year after a five year downturn. This is suspected to be due to a decrease in the drift net fishery in the Irish Sea.

$360 million is generated from salmon angling in Scotland each year.

The extremely high cost of salmon fishing in Scotland gives New Brunswick a competitive advantage in selling opportunities for fishing this species, even with travel cost included. The high catch per unit effort rates on the best water during prime time in Scotland can be matched in New Brunswick on our best private water, and the normal rates for secondary water such as the Dionard are similar to what can be expected for public water on the Miramichi. There should be an opportunity to sell more angling to Europeans who normally go to Scotland to fish salmon. One selling point to the environmentally conscious Europeans might be our grilse-only policies which contrast with the laissez faire policy of the Scots. Once thought to be a negative factor which might cause trophy anglers to avoid New Brunswick, large salmon hook and release might now be a selling point.

Outfitting Industry

Regulations

Guides, known locally as gillies, are not required by non-resident anglers, but are generally employed anyway because the catch is much greater with their help. There is no formal training for guides, and the beat manager generally knows and selects local men from the community who are familiar with the river to provide this service.

RUSSIA

Russia is a relatively new competitor in the atlantic salmon market. The region offers excellent salmon fishing opportunities with high catch rates and very little regulation. However, it is an expensive product to access and facilities and services are, apparently, of generally poor quality. As Russia continues to open up and seek out foreign currency, it can be expected that this product will be further developed.

APPENDIX V

THE MARKETS

APPENDIX V

THE MARKETS

POTENTIAL MARKETS

For New Brunswick's outfitting industry, the United States hunting and fishing market is arguably the province's most significant market. With a high population of hunters and anglers, (in 1991, there were some 14.1 million people who hunted and 35.6 million who fished in the U.S.[1]) the U.S. is a large and potentially growing market for New Brunswick.

The Canadian market, while considerably smaller than the U.S., is also an important potential market for the New Brunswick outfitting sector. The most recent data indicates that there were almost 5.5 million anglers[2] and 1.7 million hunters[3] in Canada in 1990 and 1987 respectively.

Overseas, the U.K. market has a strong interest in Atlantic Salmon angling and offers some potential for New Brunswick.

The soft adventure market is also a potential market for the hunting and fishing sector in New Brunswick. In North America, soft adventure/outdoor tourism is a significant and growing segment of the travel industry. It has been estimated that over 32 million North Americans take a trip away from home to view wildlife.

The following section highlights the hunting, fishing, and soft adventure recreation markets in the U.S., Canada, Germany, and the U.K., as well as several other markets which have been identified as having potential for this sector.

Figure V-1 illustrates the various U.S. census regions which are referred to herein.

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[1]Based on the 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation which surveyed the recreational activities of U.S. residents.

[2]Sport Fishing in Canada, 1990. Data from Fisheries and Oceans Canada, 1993.

[3]The Importance of Wildlife to Canadians in 1987. Canadian Wildlife Service, 1992.

FIGURE V-1

U.S. CENSUS REGIONS

HUNTING MARKETS

United States

Wildlife-related recreation is, and continues to be, a popular activity for millions of Americans. In a 1991 national study of hunting, fishing and non-consumptive wildlife participation (U.S. Department of the Interior, 1993), the total number of hunters 6 years of age and older were found to have increased 3% since 1985, while the expenditures for hunting increased by 7%. However, while there were more hunters in 1991 than in 1985, the national participation rate in hunting did not change and remained at approximately 7.4%.

Exhibit V-1 illustrates the 1991 participation of U.S. hunters by type of hunting - big game, small game, migratory bird, and other animal hunting. In terms of big and small game, the West North Central region had the highest participation rates (8% and 9% respectively), followed by the East South Central region (8% and 7% respectively). Migratory bird hunting participation was the highest in the West South Central region (4%), followed by the West North Central and East South Central regions with participation rates of 3% each. Other animal hunting receives proportionately lower participation rates in all regions of the U.S..

Canada

The 1987 national study of wildlife-related recreation in Canada (Canadian Wildlife Service, 1992) found there to be a decrease in the number of hunters in Canada in 1987 (1.7 million) when compared to 1981 (1.8 million). In terms of participation, the national participation rate in hunting decreased from 9.8% in 1981 to 8.4% in 1987, while the proportion of the population who were identified in the survey as *potential hunters*[4] increased from 9.4% in 1981 to 10.2% in 1987.

Exhibit V-2 presents the hunting participation rates in Canada by province. New Brunswick had the highest participation rate in hunting (21.5%), which was some 13% above the national average of 8.4%. Overall, hunting participation rates were the highest in Atlantic Canada and in the three Prairie provinces.

In terms of big game hunting, participation rates remained stable (5%) across

[4]*Potential hunters* were defined to be those who have not hunted but indicated an interest in the sport.

EXHIBIT V-1
REGIONAL PARTICIPATION OF U.S. HUNTERS BY TYPE OF HUNTING (1991)

Region	Participation (%)			
	Big Game	Small Game	Migratory Bird	Other Animal
West North Central	8	9	3	1
East South Central	8	7	3	1
Mountain	8	4	2	1
East North Central	7	5	1	1
West South Central	7	4	4	1
Middle Atlantic	5	3	1	1
South Atlantic	5	3	1	1
New England	4	2	1	---
Pacific	2	2	1	---

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 75, 76)

Notes: a) --- = less than 0.5 percent
b) Participation rates include multiple responses as many hunters hunt more than one type of game.
c) Data is for population 16 years and over.

EXHIBIT V-2
COMPARISON OF HUNTING PARTICIPATION RATES IN CANADA BY PROVINCE OF RESIDENCE: 1981 TO 1987

PROVINCE	PARTICIPATION (%)	
	1981	1987
Newfoundland	19.9	17.1
Prince Edward Island*	9.2	9.4
Nova Scotia*	16.3	16.1
New Brunswick*	20.0	21.5
Quebec	9.4	8.1
Ontario	7.3	6.1
Manitoba	11.2	9.4
Saskatchewan	14.8	10.9
Alberta*	11.4	10.2
British Columbia*	8.4	6.9
Canada	**9.8**	**8.4**

* The variance from 1981 to 1987 is not statistically significant (Canadian Wildlife Service, 1992).

Source: Canadian Wildlife Service, 1992. The Importance of Wildlife to Canadians in 1987.

Canada between 1981 and 1987, except in New Brunswick where the participation in big game hunting *increased* by some 2.9%, and in Saskatchewan where a participation decline of 2.5% occurred. In 1987, fewer Canadians hunted for waterfowl (a decrease of 1.5% to 2.5%), other birds (down 1.1% to 4.3%), and small mammals (down 1.3% to 5%) than in 1981.

In terms of the number of days spent hunting, Canadian hunters spent an average of 17.0 days hunting in 1987, a decrease of 0.9 days from the average in 1981.

Overseas

The level of long-haul travel from Europe to Canada has been significantly increasing over recent years. From 1985 to 1990, the volume of European visitation to Canada increased by some 70%, with 62% of these coming from Britain, France, and Germany.

Germany

Within the European market, the German market has been identified by Tourism Canada as a particularly nature-oriented market which is well suited to wilderness activities including hunting, fishing, and soft adventure. For Germans, Canada is the second most attractive long-haul destination (U.S. being the first). Atlantic Canada was the *main destination* for 5.3% of Germans travelling to Canada in 1990[5], with the most popular main destination being Ontario (52.9%).

Statistics from the Canadian Consulate in Germany indicate that there are some 263,000 licensed hunters in Germany (excluding the former East Germany). These hunters also enjoy other outdoor activities including fishing, golfing, horseback riding, sailing, diving, and skiing. Comfort is considered to be of significant importance to the German hunting market.

In interviews with two German hunting and fishing tour operators, German participation in hunting and fishing activities was identified as fairly stable although trans-Atlantic trips are much more difficult to sell as a result of the economic recession. Salmon was indicated as the most popular game species. However, there are some good salmon rivers available in Europe and a week of salmon fishing there is far cheaper than a fishing trip to Canada. Canadian

[5]Introductory Guide to the German Travel Market, Canada Tourism Office, Canadian Consulate, Germany. (n.d.)

salmon trips are thus restricted to a very small, affluent segment of the market. Other game interests of the German market may include trout, black bear, whitetail deer, and possibly waterfowl.

In the 1989 Tourism Canada report, Pleasure Travel Markets to North America: West Germany, the actual and potential[6] long-haul West German market is estimated to be some 11.2 million people, including some 6.29 million travellers who actually took a long-haul trip in the past three years.

In terms of Canada, it is estimated that some 450,000 Germans travelled to Canada on one of their most recent long-haul trips. During this trip, 12% (54,000) participated in hunting and 27% (121,500) participated in fishing.

In Tourism Canada's survey, the "Sports and Entertainment" segment (those travellers interested in a variety of sports including hunting and fishing), was estimated to be 24% (1,509,600 persons) of the long-haul West German market. From this data, the target hunting and fishing market for New Brunswick is calculated to be 2,000 primary potential travellers and 106,000 secondary potential travellers based on the following statistics:

- 10% (150,960) of the "Sports and Entertainment" segment actually visited Canada between 1986 and 1989.
- 7% (106,000) of this segment identified Canada to be the long-haul destination they were most likely to visit. (Secondary potential market.)
- 2% (2,000) of those likely to visit Canada identified *New Brunswick* as one of the top three Canadian destinations they are interested in visiting. (Primary potential market.)

United Kingdom

In Tourism Canada's 1989 survey of U.K. pleasure travel markets, the long-haul U.K. market is estimated to be some 4.7 million people, of which 70% (3.29 million) have actually taken a long-haul trip in the past three years, and some 30%

[6]Actual and potential travellers are defined in the survey to be those who have taken a long-haul trip of at least 4 nights in the past 3 years, or those who intend to take such a trip in the next 2 years.

(1.41 million) intend to take a long-haul trip in the next two years.

Of this long-haul market, it is estimated that some 520,000 U.K. travellers visited Canada on one of their most recent long-haul trips. During this trip, only 1% (5,200) participated in hunting while some 11% (57,200) participated in fishing.

More specifically, the "Sports and Entertainment" segment of the U.K. market was estimated to be some 21% (690,900 persons) of the long-haul U.K. market. From this data, the target hunting and fishing market for New Brunswick is estimated to be 600 primary potential travellers and 62,000 secondary potential travellers based on the following statistics:

- 13% (89,817) of the "Sports and Entertainment" segment actually visited Canada on their 2 most recent long-haul trips
- 9% (62,000) of this segment identified Canada to be the long-haul destination they were most likely to visit. (Secondary potential market.)
- 1% (600) of those likely to visit Canada identified *New Brunswick* as one of the top three Canadian destinations they are interested in visiting. (Primary potential market.)

Exhibit V-3 compares the size of the West German and U.K. potential hunting and fishing markets.

As discussed early in this report, interviews with two U.K. wholesalers currently selling the Canadian outdoor product have indicated that the hunting product has limited appeal in the U.K., while interest in fishing (particularly Atlantic Salmon) is much stronger.

FISHING

United States

In the United States, there were 35.6 million people who participated in fishing in 1991. Of this number, some 2.493 million fished for salmon (see Exhibit V-4). Details on regional U.S. fishing participation are presented later in this section.

EXHIBIT V-3

COMPARISON OF WEST GERMAN AND U.K. HUNTING AND FISHING MARKETS

	WEST GERMANY	UNITED KINGDOM
Actual[7] Target Market	6,290,000	3,290,000
Potential[8] Target Market	4,910,000	1,410,000
Total Long-Haul Target Market	**11,200,000**	**4,700,000**
Travellers To Canada:	450,000	520,000
Participated in Hunting in Canada	54,000 (12%)	5,200 (1%)
Participated in Fishing in Canada	121,500 (27%)	57,200 (11%)
Sports & Entertainment Segment	**1,509,600 (24%)**	**690,900 (21%)**
Who Visited Canada 1986-1989	150,960 (10%)	89,817 (13%)
Secondary Potential Market (Most likely to visit Canada)	106,000 (7%)	62,000 (9%)
Primary Potential Market (Would like to visit New Brunswick)	2,000 (2%)	600 (1%)

Source: Tourism Canada, 1989. Pleasure Travel Markets to North America: United Kingdom.

Tourism Canada, 1989. Pleasure Travel Markets to North America: West Germany.

[7]Have taken a long-haul trip in last 3 years.

[8]Intend to take a long-haul trip in next 2 years.

EXHIBIT V-4

U.S. SALMON ANGLERS

TYPE OF FISHING	PERCENTAGE WHO FISHED SALMON	NUMBER OF SALMON ANGLERS
GREAT LAKES FISHING	28%	721,000
SALTWATER FISHING	9%	783,000
FRESHWATER FISHING	3%	989,000
TOTAL		2,493,000

Note: 1) Total number of salmon anglers includes some double counting as some anglers fished salmon in more than one source (i.e., Great Lakes fishing, Saltwater fishing.)

2) Anglers = 16 years and older.

Source: U.S. Dept. of Interior, 1993. 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

Canada

Of the nearly 5.5 million active anglers (of all ages) in Canada, the majority are concentrated in Ontario and Quebec, with 37.9% and 28.9% of Canadian anglers respectively. Exhibit V-5 presents the number and participation rates of resident anglers by jurisdiction in 1985 and 1990. As illustrated in the Exhibit, the Yukon has the highest regional participation in angling, with some 38.7% of the population participating in the sport. Newfoundland, Quebec, British Columbia, and Ontario follow with participation rates of some 36.6%, 23.3%, 22.4, and 21.2% respectively.

In comparing the 1985 and 1990 Sport Fishing Surveys, it is evident that the total number of anglers has increased from 5.400 million anglers in 1985 to 5.467 million anglers in 1990. This change, however, does not indicate a higher participation in the sport but rather reflects a population increase. In fact, the national average angling participation in Canada declined slightly from 21.3% in 1985 to 20.6% in 1990. New Brunswick, however, experienced a decline in participation rate from 21.8% in 1985 to 14.4% in 1990.

In terms of expenditures, active resident and non-resident Canadian anglers spent a total of some $2.296 billion on food, lodging, transportation, fishing supplies, fishing services, and fishing packages (including outfitters and general package costs) in Canada in 1990. For the resident angler, this translates to an average expenditure of $559/angler (incurred in the resident angler's jurisdiction), while the average non-resident Canadian angler and non-Canadian angler spent an average of $636 and $706 each on fishing related expenses.

Angling effort varies among resident, non-resident Canadian, and non-Canadian anglers. 1990 statistics for the average number of days/angler spent fishing in Canada are as follows:

- 15.5 days for resident Canadian anglers
- 6.8 days for non-resident Canadian anglers
- 7.5 days for non-Canadian anglers

EXHIBIT V-5
PARTICIPATION OF CANADIAN RESIDENT ANGLERS BY JURISDICTION, 1985 - 1990

Jurisdiction	Number of Anglers[9]		Participation Rate (%)		Percentage of Total (%)	
	1985	1990	1985	1990	1985	1990
British Columbia	612,610	699,854	21.2	22.4	11.3	12.8
Alberta	417,435	316,843	17.7	12.8	7.7	5.8
Saskatchewan	195,886	174,108	19.2	17.4	3.6	3.2
Manitoba	191,979	184,173	18.0	16.9	3.6	3.4
Ontario	2,328,192	2,069,347	25.7	21.2	43.1	37.9
Quebec	1,204,593	1,578,237	18.3	23.3	22.3	28.9
New Brunswick	156,873	104,048	21.8	14.4	2.9	1.9
Nova Scotia	99,554	95,650	11.3	10.7	1.8	1.7
P.E.I.	15,095	15,033	11.9	11.5	0.3	0.3
Newfoundland	159,510	209,644	27.5	36.6	3.0	3.8
Yukon	7,431	10,095	32.4	38.7	0.2	0.2
NWT	10,995	10,093	21.6	18.8	0.2	0.2
TOTAL	5,400,153	5,467,125	21.3	20.6	100.0	100.0

Source: Sport Fishing in Canada, 1990. Fisheries and Oceans Canada, 1991.

Sport Fishing in Canada, 1985. Fisheries and Oceans Canada, 1986.

[9]Anglers of all ages

In Atlantic Canada, a recent study of vacation habits indicated that some 12% of Atlantic Canadians participated in hunting and/or fishing on their most recent vacation of at least 5 days. Of this average, 18% (102,000) of Newfoundland residents, 11% of both Nova Scotia (96,000) and New Brunswick (78,000) residents, and 6% (7,600) of Prince Edward Island residents participated in hunting and fishing on their most recent vacation.

Overseas

Germany

In Germany, there are some 780,000 regular anglers (excluding the former East Germany), and approximately 3.32 million Germans practice fishing occasionally (Canadian Consulate, Dusseldorf 1993). In terms of other outdoor activities, German anglers also like hunting, golfing, sailing, and other types of water sports. (Statistics on the potential German angling market to Canada were identified in the preceding section on hunting markets in Germany.)

United Kingdom

Data regarding the potential U.K. angling market for New Brunswick are included in the preceding section on hunting markets in the U.K..

REGIONAL PARTICIPATION AND TRENDS IN U.S. HUNTING AND FISHING

Exhibit V-6 presents a regional breakdown of the number and participation rates of U.S. hunters and anglers in 1991. The West North Central region (including North and South Dakota, Nebraska, Kansas, Iowa and Minnesota) has the highest participation rate in hunting (13%), fishing (27%), and non-consumptive activities (70%). The East South Central region (Kentucky, Tennessee, Mississippi, and Alabama) is also a strong region for hunting and fishing, with participation rates being 11% for hunting and 23% for fishing.

In comparison, the New England region (Maine, New Hampshire, Vermont, Connecticut and Rhode Island) has the lowest regional participation rate in hunting (4%, tied with Pacific region), and the second lowest participation rate in fishing (15%, also tied with the Pacific region). This finding illustrates that New England participation is below the national average of 7.4% and 19% in hunting and fishing respectively.

EXHIBIT V-6

REGIONAL U.S. PARTICIPATION IN HUNTING AND FISHING (1991)

REGION	HUNTING		FISHING	
	Number ('000)	Partic. (%)	Number ('000)	Partic. (%)
Pacific	1,101	4	4,505	15
Mountain	1,069	11	2,079	21
West North Central	1,709	13	3,647	27
West South Central	1,843	9	4,592	23
East North Central	2,789	9	6,264	19
East South Central	1,279	11	2,635	23
Middle Atlantic	1,746	6	3,871	13
South Atlantic	2,083	6	6,441	19
New England	444	4	1,545	15
National Total	**14,063**	**7.4**	**35,578**	**19**

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 46, 73, 75, 101)

More detailed data regarding participation in these activities is presented in Exhibit V-7. In terms of the number of sportsmen, Texas, California, Florida, New York, and Pennsylvania had the highest populations of hunters and anglers. In terms of participation, Minnesota had the highest participation rate (36.4%), followed by Wisconsin (31.9%), Mississippi (30.9%), and Missouri (29.3%). Selected New England and Mid-Atlantic states are represented at the bottom of Exhibit V-7 for comparative purposes. While New York and Pennsylvania (Mid-Atlantic) have high populations of hunters and anglers, the remaining New England states largely do not. However, several of these states, i.e., Vermont and Maine, have very high participation in these sports with participation rates of 29.4% and 28.8% respectively.

In studying New England more closely, it can be seen that the participation[10] rates of sportsmen have been increasing from 1955 to 1985 (Exhibit V-8). While the data presented in this Exhibit cannot be compared to 1991 data due to changes in survey methodology, distinctive trends can be identified. For example, angler participation rates have steadily increased from 12.7% in 1955 to 18.8% in 1975. Although there was a decline marked by the 1980 survey (angler participation of 17.5%), this rate increased again in 1985 to 18.1%.

In terms of hunters, however, the reverse is true. In 1955, 7.4% of New Englanders participated in hunting, while by 1985 this level had dropped to 5.2%. Overall, New England experienced a participation decline in hunting for all but one of the national survey years (an increase occurred in the 1970 survey).

Another trend which has occurred in the U.S. is a population shift from the Northeastern regions of the U.S. to the West and Southern states. This trend has occurred as a result of several factors including better employment opportunities and more favourable climatic conditions in the South and West. This has had a negative impact on New Brunswick's traditional markets for these products.

Additional exhibits are presented at the end of this Appendix which provide more detailed statistics on hunting and fishing participation.

[10]Participation rates in this Exhibit refer to the population 12 years of age and older.

EXHIBIT V-7
U.S. HUNTERS AND ANGLERS BY STATE OF RESIDENCE AND PARTICIPATION, BY HIGHEST NUMBER OF SPORTSMEN (1991) ('000)

State of Residence	State Population	Sportsmen							
		Fished Only		Hunted Only		Fished And Hunted		Total Sportsmen	
Texas	12,548	1,946	15.5%	315	2.5%	703	5.6%	2,964	23.6%
California	22,366	2,376	10.6%	206	0.9%	331	1.5%	2,913	13.0%
Florida	10,320	1,690	16.4%	70*	0.7%	278	2.7%	2,038	19.7%
New York	13,803	1,229	8.9%	261	1.9%	427	3.1%	1,917	13.9%
Pennsylvania	9,405	844	9.0%	338	3.6%	581	6.2%	1,763	18.7%
Ohio	8,306	1,111	13.4%	224	2.7%	357	4.3%	1,692	20.4%
Michigan	7,014	906	12.9%	254	3.6%	531	7.6%	1,691	24.1%
Illinois	8,899	1,213	13.6%	167	1.9%	290	3.3%	1,670	18.8%
Minnesota	3,308	754	22.8%	96	2.9%	356	10.8%	1,205	36.4%
Wisconsin	3,700	533	14.4%	210	5.7%	436	11.8%	1,180	31.9%
Missouri	3,940	677	17.2%	117	3.0%	362	9.2%	1,156	29.3%
North Carolina	5,104	752	14.7%	101	2.0%	300	5.9%	1,153	22.6%
Georgia	4,840	735	15.2%	84	1.7%	252	5.2%	1,071	22.1%
Virginia	4,721	654	13.9%	93	2.0%	275	5.8%	1,022	21.6%
Indiana	4,267	648	15.2%	82	1.9%	238	5.6%	968	22.7%
Tennessee	3,818	564	14.8%	96	2.5%	240	6.3%	900	23.6%
Louisiana	3,161	549	17.4%	81	2.6%	252	8.0%	882	27.9%
Alabama	3,110	445	14.3%	78	2.5%	233	7.5%	756	24.3%
Kentucky	2,826	397	14.0%	90	3.2%	249	8.8%	737	26.1%
Mississippi	1,914	298	15.6%	85	4.4%	208	10.9%	591	30.9%
West Virginia	1,420	101	7.1%	113	8.0%	157	11.1%	372	26.2%
SELECTED NEW ENGLAND and MID-ATLANTIC STATES:									
New York	13,803	1,229	8.9%	261	1.9%	427	3.1%	1,917	13.9%
Pennsylvania	9,405	844	9.0%	338	3.6%	581	6.2%	1,763	18.7%
Massachussets	4639	492	10.6%	29*	0.6%	91	2.0%	612	13.2%
Maine	953	151	15.8%	38	4.0%	85	8.9%	274	28.8%
New Hampshire	864	124	14.4%	14	1.6%	52	6.0%	189	21.9%
Vermont	446	62	13.9%	21	4.7%	48	10.8%	131	29.4%

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 106, 110)
Notes: a) Population 16 years and older. b) * = Small sample size

EXHIBIT V-8
TRENDS IN HUNTING AND FISHING PARTICIPATION
IN NEW ENGLAND
1965 - 1985

YEAR	SPORTSMEN	ANGLERS	HUNTERS
1955	15.4	12.7	7.4
1960	16.4	14.4	6.2
1965	17.8	16.0	6.3
1970	18.3	16.5	6.7
1975	20.2	18.8	5.7
1980	19.3	17.5	5.6
1985	19.5	18.1	5.2

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp B-7)

Note: Data based on population 12 years of age and older.

SOFT ADVENTURE RECREATION

Soft adventure travel is one of the fastest growing segments of the travel industry today. Key societal changes that have fostered this interest in outdoor activity and experience include an increased public environmental awareness, a concern for healthier lifestyles, and increased affluence among travellers. Travel of this nature thus caters to an environmentally conscious market that strongly values the intrinsic and aesthetic qualities of natureand nature-related activities.

Generally, soft adventure travellers are nature-oriented travellers who are attracted to areas with significant natural beauty and attributes. They respond to a wide array of travel motivators including education, aesthetic experience, adventure, environmental conservation, natural history, outdoor recreation, and the peace and tranquillity associated with "wild" places somewhat free of human intervention and development.

The types of activities which interest the soft adventure traveller include nature observation, walking, hiking, photography, birding, environmental education (i.e., geology, flora and fauna), natural history, wildlife viewing, and other non-consumptive activities including cross-country skiing and rock hounding.

Soft adventure travellers tend to seek unique and special travel experiences and are often value-sensitive. Other attributes of the soft adventure travel market are listed below. Generally, soft adventure travellers tend to be,

- well educated
- relatively wealthy
- well travelled, enjoy travelling, and do so readily
- physically fit and somewhat adventurous
- highly focused in their interests and pursue them avidly
- outdoor enthusiasts
- equally split between females and males
- travel with a purpose which includes a strong nature component oriented to wilderness areas, national parks and reserves, rural areas, historic sites, cultural activities, and scenic land and seascapes
- desire new or unique experiences
- less demanding than conventional tourists and require fewer comforts
- take longer trips and spend more per day than those with lesser interest in nature

- afford quality food and lodging although they do not always seek them - they tend to value low-impact accommodations that are not damaging to the environment.
- value-conscious
- of all age groups, although the majority are "baby-boomers" and "middle-agers"

United States

The total U.S. participation (of the population aged 6 years and older) in non-consumptive recreation (including activities around the home and primary trips away) was some 55% in 1991, of which the participation rate in *residential* non-consumptive activities was 39%, and *primary* non-consumptive activities (taking trips of at least 1 mile away from home) was 16%.

Another interesting trend to note is that there is a considerable overlapping of activities between sportsmen (anglers and hunters) and non-consumptive recreation participants. The 1991 national survey found that 69% of the hunters also fished, 27% of the anglers also hunted, and some 50% and 57% of anglers and hunters respectively also participated in primary non-consumptive activities. Conversely, some 26% of all non-consumptive participants (including residential and non-residential) hunted and/or fished during the survey year in 1991.

In the United States, it is estimated that there were some 265 million recreational visits[11] in 1989 (domestic and international) to the national parks system. In a 1992 study by the U.S. Travel Data Centre entitled Discover America: Tourism and the Environment, the U.S. "ecotourism" market is estimated to be some 43 million people: 8 million Americans reported to have taken at least one ecotourism trip[12], with another 35 million "potential" ecotourists who stated they will likely take an ecotourism trip in the next three years.

In terms of participation, some 59 million Americans participated in nature observation/bird watching in 1986 and over 27 million participated in wildlife

[11]deCourcy Hinds, cited in The Greening of Tourism: Ecotourism and its Potential for Canada, MacDonald 1993.

[12]An "ecotourism" trip was defined in the study as a trip during which travellers learn about and appreciate the environment.

viewing at least one mile away from home.[13]

The New England market, with a population of nearly 10 million people, has both geographic and cultural ties to Atlantic Canada. New England residents have the second highest regional participation in the U.S. in non-consumptive activities (63%), some 8% above the national average. Further, New Englanders tend to participate in outdoor recreation on a year round basis, and are active in organizations such as the Appalachian Mountain Club and the Audubon Society.

In terms of outdoor participation, the New England market coupled with the Mid-Atlantic region of the U.S. represents a market of some 15 million persons[14] who participate in nature observation and bird watching[15].

Exhibit V-9 presents the participation rates of adult U.S. residents in various outdoor activities as identified in the 1986 President's Commission on Americans Outdoors report.

Canada

In Canada, participation[16] rates in non-consumptive wildlife-related activities are shown to be on the increase. The 1987 National Survey on the Importance of Wildlife to Canadians (Canadian Wildlife Service, 1992) found that while participation in consumptive wildlife use (i.e., hunting) decreased from 1981 to 1987, participation in non-consumptive outings (i.e., nature observation) significantly increased. In 1987, 15.2 million Canadians (75.9% of the population), watched, photographed, fed, or studied wildlife in and around their

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[13]Nova Scotia Product Market Match: Strategy for Nature Observation Tourism Product, the Economic Planning Group of Canada, 1990.

[14]President's Commission on Americans Outdoors, Report and Recommendations to the President of the United States, December 1986.

[15]It is important to note that participation does not necessarily imply that these persons are taking trips for these purposes.

[16]It should be noted that the Canadian participation rates in non-consumptive wildlife-related activities cited here can not be directly compared to those of the U.S. in this report, as the 1987 Canadian survey included incidental (or secondary) wildlife activities that occurred during other trips or outings, whereas secondary activities were not included in the 1991 U.S. survey.

EXHIBIT V-9
RANK ORDER OF ADULT U.S. PARTICIPATION
(1 OR MORE TIMES) IN PAST YEAR (1986)

ACTIVITY	SOMETIMES/OFTEN/ VERY OFTEN
Walking for pleasure	84%
Sightseeing	77%
Swimming Outdoors	76%
Bicycling	46%
Bird Watching, Nature Study	35%
Day Hiking	27%
Canoeing/Kayaking/Rafting	22%
Backpacking	17%
Horseback Riding	15%
Cross Country Skiing	8%

Source: President's Commission on Americans Outdoors, 1986. Report and Recommendations to the President of the United States.

homes or while on outings or trips, as compared to 13.4 million people (72.7%) in 1981.

In 1987, some 4.4 million Canadians (22% of the population) took a *primary* non-consumptive wildlife-related trip. During these trips, wildlife observation (3.6 million) and photographing wildlife (1.6 million) were the two most common activities participated in. Similarly, some 14.0 million and 9.1 million Canadians participated in *residential* non-consumptive wildlife activities and *incidental* non-consumptive wildlife encounters (during other trips or outings) respectively.

Of the three types of non-consumptive activities identified in the study, (primary, residential, and incidental activities), the most growth was experienced in primary non-consumptive trips and outings, which increased 22.7% from 3.6 million participants in 1981 to 4.4 million participants in 1987.

Exhibit V-10 illustrates the provincial participation rates in non-consumptive wildlife-related activities. While participation in non-consumptive recreation increased in every jurisdiction in Canada in 1987, the highest participation rates in 1987 occurred in Prince Edward Island, Nova Scotia, Ontario, Alberta, and British Columbia. Participation rates increased the most in the Atlantic Canadian provinces.

Atlantic Canada

In a closer look at the Atlantic Canada provinces, a recent study of vacation habits[17] of Atlantic Canadians indicated that one in four (25%) cited outdoor activities as the kind of activities they were most likely to participate in while on a vacation or pleasure trip. The same study found that some 53% (1,207,000) of Atlantic Canadians actually participated in outdoor activities during their most recent vacation, while 85% participated in sight seeing and 59% visited historic sites. The findings of this study also indicate that those who participated in outdoor activities tended to be of a relatively high income bracket ($70,000 or more). Overall, Atlantic Canadians perceive scenery to be New Brunswick's strongest feature as a vacation destination.

[17]Vacation Habits of Atlantic Canadians, Corporate Research Associates Inc., 1993.

EXHIBIT V-10
COMPARISON OF NON-CONSUMPTIVE WILDLIFE-RELATED PARTICIPATION IN CANADA BY PROVINCE OF RESIDENCE: 1981 TO 1987

PROVINCE	PARTICIPATION (%)	
	1981	1987
Newfoundland	56.5	67.2
Prince Edward Island	68.9	81.3
Nova Scotia	74.6	81.7
New Brunswick	67.4	72.5
Quebec	68.7	72.1
Ontario	74.3	77.7
Manitoba	72.1	75.1
Saskatchewan*	71.4	72.1
Alberta	76.2	78.6
British Columbia*	79.6	80.9
Canada	**72.7**	**75.9**

* The variance from 1981 to 1987 is not statistically significant (Canadian Wildlife Service, 1992).

In terms of regional participation in outdoor activities, approximately half of the population in each Atlantic Canadian province participated in hiking, bicycling, canoeing, or golfing during their most recent vacation. Provincial participation rates in outdoor activities are as follows:

- New Brunswick - 57% (404,000 persons)
- Newfoundland - 52% (295,000 persons)
- Nova Scotia - 51% (445,000 persons)
- Prince Edward Island - 49% (62,000 persons)

Overseas

Germany

Interviews with the Canadian Consulate in Germany as well as a German tour operator selling hunting and fishing trips to Canada indicated that the German market is interested in non-consumptive, "back-to-nature" activities. Tourism Canada's 1989 survey of West German pleasure travellers indicated that 51% (229,500) of West German travellers to Canada participated in wildlife or bird observation, and 37% (166,000) participated in climbing, hiking, and other outdoor activities during a long-haul trip to Canada.

The "Culture and Nature" segment (those interested in nature-related activities including viewing wildlife and birds) was estimated to be some 17% (1,069,300 persons) of the long-haul West German market (Tourism Canada Pleasure Travel Market Survey 1989). From this data, the target non-consumptive market for New Brunswick is calculated to be 3,000 prime potential travellers and 107,000 secondary potential travellers based on the following statistics:

- 11% (117,623) of the "Culture and Nature" segment actually visited Canada between 1986 and 1989.
- 10% (107,000) of this segment identified Canada to be the long-haul destination they were most likely to visit. (Secondary potential market.)
- 3% (3,000) of those likely to visit Canada identified *New Brunswick* as one of the top three Canadian destinations they are

interested in visiting. (Primary potential market.)

United Kingdom

Tourism Canada's 1989 survey of U.K. pleasure travellers to North America indicated that 29% (150,800) of U.K. travellers to Canada participated in wildlife or bird observation, and 10% (52,000) participated in climbing, hiking, and other outdoor activities during a long-haul trip to Canada.

The "Culture and Nature" segment was estimated to be some 16% (526,400 persons) of the long-haul West German market (Tourism Canada Pleasure Travel Market Survey 1989). From this data, the target non-consumptive market for New Brunswick is calculated to be 2,000 prime potential travellers and 68,000 secondary potential travellers based on the following statistics:

- 23% (121,072) of the "Culture and Nature" segment actually visited Canada on their 2 most recent long-haul trips
- 13% (68,000) of this segment identified Canada to be the long-haul destination they were most likely to visit. (Secondary potential market.)
- 3% (2,000) of those likely to visit Canada identified *New Brunswick* as one of the top three Canadian destinations they are interested in visiting. (Primary potential market.)

SELECTED SOFT ADVENTURE ACTIVITIES

Bird Watching

Given that bird watching is one of the fastest growing outdoor activities in North America, there is a potential to attract birders to New Brunswick and incorporate bird watching activities into the province's outdoor product.

The bird watching market is comprised of a variety of bird "enthusiasts" and is thus considered to be a complex market. Generally there are three main types of bird watchers:

- the *species specific birder* - this birder, although only a small portion of the bird watching market, is quite active and will travel to a particular area to view a specific bird species.

- the *spectacle birder* - this type of birder is interested in unique birding events such as viewing a uniquely large colony of nesting birds, or visiting an area which is known for a large population i.e., bald eagles in Cape Breton or the Annapolis Valley.

- the *occasional birder* - this birder will not travel specifically to bird watch but will partake in birding as part of other nature-related activities. The occasional birder enjoys quiet, scenic areas and likes to experience a variety of activities including appreciating nature, natural history and culture.

In New Brunswick, the potential to attract true birding enthusiasts i.e., "destination" or "species specific" birders, is not significant since the province generally does not have endemic or particularly unique bird species which could attract these active birders. However, the province as a whole and many areas along the coast in particular are generally good birding areas for the "occasional" birder. Bird watching may thus be one of several nature-related activities which could be offered by outfitters in New Brunswick.

Snowmobiling

Snowmobiling is reputed to be the fastest-growing winter recreation sport in Canada.[18] The International Snowmobile Industry Association (ISIA) estimates that there are some 10 million registered snowmobiles in Canada and the United States. In Atlantic Canada, snowmobiling is similarly becoming one of the most popular winter activities with some 10,000 and 7,500 estimated active snowmobilers in Nova Scotia and New Brunswick respectively.

Some of the key characteristics of the snowmobile markets are:

- the vast majority of snowmobilers consider it to be a family sport

- the median age of snowmobile owners is 35 - 39 years

- snowmobilers travel in groups of 7 persons on average

- tend to be year-round outdoor enthusiasts

[18]Snowmobiling in Nova Scotia: The Key to Sustainable Winter Tourism, Sport Nova Scotia.

- have higher than average incomes
- tend to re-visit areas
- average trip length is 3 days extending over 370 miles of trails
- 58% of active snowmobilers take an average of 4 trips per year, staying 2 nights.

Generally the snowmobile market for New Brunswick will be comprised of Atlantic Canadian residents and residents of Quebec and Maine. While the number of households owning snowmobiles does not indicate the level of participation associated with the sport, this data can generally define the size of the snowmobiling market. (See Exhibit V-11)

OTHER MARKETS WITH POTENTIAL FOR THE OUTFITTING SECTOR

Getaway Market

The getaway market generally includes trips of one to four nights duration, for the purposes of pleasure or visiting friends and relatives. Summer is the most popular time for such trips and 77% of getaway trips in North America are taken by car. Most Canadian vacationers stay within their own province.

The growth in the getaway market is being driven by the increasing number of dual income families who have difficulty scheduling long vacations, and in response to the stress of modern lifestyles.

Some 4 million Canadian households took getaway trips in 1988, representing almost 8% of all overnight trips. In the United States, almost 30% of overnight trips were weekend vacations, resulting in over 200 million weekend vacation trips i 1989.

Getaway destinations are chosen because of a friend or relative at a chosen destination, a major activity or an event. Favourite pastimes include shopping, sightseeing, visiting, dining, sports/outdoor activities and nightlife. In terms of accommodations, the getaway market is lcoking for luxury, amenities or extras, proximity to activities and on-site recreational facilities and activities.

EXHIBIT V-11

NUMBER OF HOUSEHOLDS WITH SNOWMOBILES (1992)

PROVINCE	HOUSEHOLDS WITH SNOWMOBILES	PERCENT OF POPULATION
Newfoundland	48,000	27.1%
PEI	--	--
Nova Scotia	19,000	5.8%
New Brunswick	25,000	9.8%
Quebec	144,000	5.4%

Source: Statistics Canada

Meetings Market

The North American conference and meetings market grew strongly in the last five years of the 1980s although it has stagnated with the continued recession which has seen a decline in business travel. In 1989, there were an estimated 1.3 million meetings in North America and over 100 million attendees. Most of the meetings (81%) are corporate meetings and over half of corporate meetings are held at resort properties.

In Canada, the average duration of meetings, according to a report by Tourism Canada completed in the late 1980s, was 1.8 days with an average size of 37 delegates.

New Brunswick, through Meetings New Brunswick, has recently begun an aggressive campaign to attract more meetings activity to the province and this market segment presents an opportunity for outfitters.

ADDITIONAL MARKET DATA TABLES

U.S. HUNTERS and DAYS SPENT HUNTING IN THE U.S. (1991)

State	Days of Hunting ('000)	Hunters ('000)	Ave Days/Hunter
Pennsylvania	15626	906	17.2
Michigan	14955	783	19.1
Texas	14953	988	15.1
New York	12788	677	18.9
Wisconsin	10983	643	17.1
Ohio	9451	570	16.6
Virginia	8570	353	24.3
Mississippi	7986	289	27.6
Tennessee	7595	313	24.3
North Carolina	7412	376	19.7
Louisiana	7398	300	24.7
Missouri	7269	465	15.6
Illinois	7238	407	17.8
Indiana	7208	310	23.3
California	6369	438	14.5
Kentucky	6112	331	18.5
Florida	5946	242	24.6
Alabama	5748	303	19.0
Georgia	5695	330	17.3
West Virginia	5677	268	21.2
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:			
Pennsylvania	15626	906	17.2
New York	12788	677	18.9
Maine	1998	123	16.2
Massachussets	1973	101	19.5
Vermont	1541	69	22.3
New Hampshire	1111	62	17.9

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 112, 114)

Note: Data includes resident in-state and out-of-state hunting.

U.S. ANGLERS and DAYS SPENT *FRESH WATER* FISHING IN STATE OF RESIDENCE (1991)
(by State with highest fishing days)

State of Residence	Days of Fishing ('000)	Anglers ('000)	Ave Days/Angler
Texas	27985	1933	14.5
Pennsylvania	21972	1178	18.7
California	18079	2014	9.0
Minnesota	15188	1080	14.1
Illinois	14788	1136	13.0
Wisconsin	14499	895	16.2
Georgia	14269	892	16.0
Florida	14175	1063	13.3
Ohio	14064	1122	12.5
New York	13867	1031	13.5
Michigan	13327	1132	11.8
Missouri	12368	961	12.9
North Carolina	12021	830	14.5
Tennessee	11403	708	16.1
Louisiana	11293	684	16.5
Indiana	10744	770	14.0
Oklahoma	10394	623	16.7
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:			
Pennsylvania	21972	1178	18.7
New York	13867	1031	13.5
Massachussets	5659	330	17.1
Maine	3152	215	14.7
New Hampshire	2138	139	15.4
Vermont	1674	101	16.6

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 117)

Note: Data includes resident fishing only.

U.S. ANGLERS and DAYS FISHING IN STATE OF RESIDENCE (1991)
(by State with highest fishing days)

State of Residence	Days of Fishing ('000)	Anglers ('000)	Ave Days/Angler
Texas	33591	2385	14.08
Florida	32428	1812	17.90
California	23191	2500	9.28
Pennsylvania	22181	1190	18.64
Michigan	22171	1419	15.62
New York	20181	1458	13.84
Ohio	17461	1342	13.01
Illinois	15670	1222	12.82
Wisconsin	15555	940	16.55
Minnesota	15150	1083	13.99
Georgia	14088	906	15.55
North Carolina	13816	990	13.96
Louisiana	13076	769	17.00
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:			
Pennsylvania	22181	1190	18.64
New York	21181	1458	14.53
Massachussets	7996	497	16.09
Maine	3554	233	15.25
New Hampshire	2234	155	14.41
Vermont	1647	101	16.31

Source: U.S. Dept. of Interior, 1991 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, 1993. (pp 112, 119)

Note: Data includes resident fishing only.

PARTICIPATION of U.S. HUNTERS IN BIG GAME HUNTING BY STATE WHERE HUNTING TOOK PLACE (1991)

State Where Hunting Took Place	Participation Rate (%)	Number of Hunters ('000)
Pennsylvania	94	969
Michigan	92	757
Texas	70	739
Wisconsin	90	672
New York	90	666
Missouri	79	411
Ohio	63	390
Minnesota	73	336
Georgia	80	329
Virginia	82	328
West Virginia	90	308
Mississippi	84	305
North Carolina	72	288
Colorado	82	286
Alabama	73	262
Illinois	57	256
Arkansas	79	249
Tennessee	64	231
Oregon	88	223
Kentucky	56	209
Indiana	62	206
Louisiana	61	203
Montana	91	202
Washington	80	197
California	44	195
Florida	76	191
South Carolina	78	184
Idaho	83	160
Maine	95	158
Utah	85	151
Wyoming	91	123
Vermont	92	93
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:		
Pennsylvania	94	969
New York	90	666
Maine	95	158
Vermont	92	93
Massachusetts	78	85
New Hampshire	86	62

Note:

a) 95% of U.S. Big Game hunters hunted in their state of residence in 1991.
b) Data includes resident (state) and non-resident (other U.S.) hunters.
c) Participation rates include multiple responses as many hunters hunt more than one type of game.

PARTICIPATION of U.S. HUNTERS IN SMALL GAME HUNTING BY STATE WHERE HUNTING TOOK PLACE (1991)

State Where Hunting Took Place	Participation Rate (%)	Number of Hunters ('000)
Pennsylvania	58	597
Ohio	71	436
Texas	39	413
Michigan	49	401
New York	45	330
Wisconsin	40	302
Illinois	66	296
Missouri	57	296
Minnesota	57	261
Kentucky	68	252
California	52	230
Indiana	69	228
Tennessee	63	227
North Carolina	56	224
Louisiana	64	212
Virginia	52	209
West Virginia	59	201
Kansas	83	199
Iowa	83	199
Mississippi	52	190
Oklahoma	68	166
Nebraska	81	137
South Dakota	80	118
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:		
Pennsylvania	58	597
New York	45	330
Maine	40	66
Massachusetts	54	58
Vermont	43	43
New Hampshire	49	35

Note: 94% of Small Game hunters hunted in their own state in 1991.

PARTICIPATION of U.S. HUNTERS IN MIGRATORY BIRD HUNTING BY STATE WHERE HUNTING TOOK PLACE (1991)

State Where Hunting Took Place	Participation Rate (%)	Number of Hunters ('000)
Texas	44	470
California	53	234
Louisiana	38	127
Illinois	27	121
Pennsylvania	11	111
Wisconsin	15	108
Alabama	29	104
North Carolina	24	94
Virginia	23	93
Michigan	11	92
Mississippi	24	86
Minnesota	18	84
Missouri	16	81
Kentucky	22	81
Oklahoma	31	77
Georgia	19	77
Arkansas	24	75
Tennessee	20	73
Arizona	39	71
South Carolina	30	70
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:		
Pennsylvania	11	111
New York	8*	60*
Massachusetts	17*	18*
Maine	7*	12*
New Hampshire	10*	7*
Vermont	5*	6*

Note: a) 95% of Migratory Bird hunters hunted in their state of residence in 1991.
b) * = data based on a small sample size

PARTICIPATION of U.S. HUNTERS IN OTHER ANIMAL HUNTING BY STATE WHERE HUNTING TOOK PLACE (1991)

State Where Hunting Took Place	Participation Rate (%)	Number of Hunters ('000)
Pennsylvania	14	144
Ohio	23	142
New York	11*	81*
Texas	7*	73*
Virginia	16	65
Kentucky	16	58
Tennessee	16	58
Nebraska	16	28
South Dakota	18	26
Maryland	17*	25*
Vermont	24	24
North Dakota	16	16
SELECTED MID-ATLANTIC and NEW ENGLAND STATES:		
Pennsylvania	14	144
New York	11*	81*
Vermont	24	24
Maine	9*	14*
New Hampshire	7*	5*
Massachusetts	12*	13*

Note: a) 94% of Other Animal hunters hunted in their state of residence in 1991.
b) * = data based on a small sample size

APPENDIX VI

DETAILED LISTING OF MAGAZINES

AND CONSUMER SHOWS

MASTER LIST OF MAGAZINES

MASTER LIST - HUNTING AND FISHING MAGAZINES

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Aim & Angle	New Brunswick Department of Economic Development and Tourism P.O. Box 6000 Fredericton, NB E3B 5H1 (506) 453-3984 Fax (506) 453-7127	annual	$300 Cdn (½ pg, 2 colour)	32,000	- used primarily as a fulfilment piece for travel information in response to awareness advertising	NBO
American Hunter	National Rifle Association of America 470 Spring Park Pl. Ste. 1000 Herndon, VA 22070 (703) 481-3383 Fax (703) 481-3376	monthly - emphasizes hunting technique, sportsmanship, safety	$ 16,000	1,205,791		
American Angler, The Magazine of Fly Fishing & Fly Tying	Abenaki Publishers, Inc. 126 North Street P.O. Box 4100 Bennington, VT 05201 (802) 447-1518 Fax (802) 447-2471	6 issues/yr - fishing magazine	$ 1,450	40,000 Northeast Region (New England, Mid Atlantic) 29.2% Southeast Region (South Atlantic, East South Central, and Louisiana) 10.3% Central Region (West South Central, southern part of West North Central) 8.0% Pacific Coast/Northwest Region (Pacific region and state of Nevada) 22.8% Target 70.3% 28,120 CPM $ 51.56	Game fished: trout 98% bass 61% Atlantic salmon 16%	

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Angler	Holmes Communications, Inc. 941 NE 19th Ave, Ste 212 Fort Lauderdale, FL 33304 (305) 763-1705 Fax (305) 763-4605	monthly - magazine for boating & fishing enthusiasts	$ 995	30,000 CPM $ 33.17		
Angler & Hunter	Ontario Outdoor Publishing Ltd. Box 1541 Peterborough, ON K9J 7H7 (705) 748-3891 Fax (705) 748-9577	10 issues/yr - fishing, hunting & conservation magazine	$ 3,022 Cdn $ 2,267 US	70,500 CPM $ 32.16		
Aqua-Field Guide to Deer Hunting	Aqua-Field Publishing Company Inc. 66 West Gilbert St. Shrewsbury, NJ 077022 (908) 842-8300 Fax: (908) 842-0281 Advertising: Bernard & Associates U.S.A. and International Advertising Sales 3965 Gibraltar Drive Reno, NV 89509 (702) 825-8407 Fax: (702) 825-3392	2 issues/yr	$ 1,740	125,000 NE 7,950 MA 15,550 SA 15,750 ESC 7,050 WSC 12,885 Target 59,185 CPM $ 29.40		
Atlantic Salmon Journal	Atlantic Salmon Federation P.O. Box 429 Chamcook, R. R. #2 St. Andrews, NB E0G 2X0 (506) 529-4581 Fax (506) 529-4985	4 issues/yr - for anglers who flyfish for Atlantic Salmon - official publication of the Atlantic Salmon Federation	$ 1,188 Cdn $ 891 US	20,000 Distribution mostly New England, Atlantic Canada, Quebec. Small international circ. (200-300) in Scotland, Ireland, France, & Scandinavia. Approximately 50% U.S. and 50% Canadian distribution. CPM $ 44.55	-primarily Atlantic Salmon anglers - magazine covers conservation and fly tying also - ave. reader spends 23 days/yr salmon angling - ave. spends $2,000 Cdn/year on fishing trips.	NBO, NB

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Barron's Outdoor Guide Budget Fishing & Hunting (black/white)	Barron's Outdoor Guide P.O. Box 181 Springboro, OH 45066 Tel/Fax: (513) 898-4801	4 issues/yr plus special issue	$ 595			
Bassmaster Magazine	B.A.S.S., Inc. 201 Gunn Rd. Montgomery, AL 36117-2003 (205) 272-9530 Fax: (205) 279-7148	10 issues/yr - covers boating & freshwater bass fishing	$ 13,530	533,444 CPM $ 25.36		NB (SE edition)
Big Buck	Big Buck Enterprises Corp. 1001 Mahoney Ave. Saskatoon, SK S7L 3Z2 (306) 382-2737				caters to trophy deer	
Bow & Arrow Hunting	Gallant/Charger Publications Inc. P.O. Box 2429 Capistrano Beach, CA 92624-0429 Advertising: Bow & Arrow Hunting P.O. Box 639 Dana Point, CA 92629 (714) 493-2101 Fax: (714) 240-8680	7 issues/yr: February, April, June, July, August, October, December - also publish Bowhunters Annual magazine - caters to bow hunters and archery enthusiasts	$ 1,215	98,500		
Bow Masters Magazine	Thicket Publishing Inc. P.O. Box 601 Helena, AL 35080 (205) 987-6007 Fax: (205) 987-2882 Advertising: Advertising Sales Director	8 issues/yr	$ 2,500	133,000 NE 3.61% MA 12.52% SA 13.09% ESC 13.29% WSC 8.43% Target 67,750 50.9% CPM $ 36.90	Type of hunting: whitetail 82% bear & elk 28%	

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Bow Hunting World	Ehlert Publishing Group Inc. 601 Lakeshore Parkway Suite 600 Minnetonka, MN 55305-5215 Advertising: Gerianne Perri (800) 848-6247 Fax: (612) 476-8065	11 issues/yr	$ 2,558	139,283 NE 6,030 MA 19,211 SA 16,827 ESC 10,895 WSC 12,480 Target 57,029 CPM $ 44.85	62.7% of readers took an overnight bowhunting trip last yr. Ave. of 2.9 overnight bowhunting trips last yr. Ave. no nights spent away on trip - 19.7.	
Bowbender	O.T. Communications Inc. Suite 600, 237-8 Ave. S.E. Calgary, AB T2G 5C3 Advertising: Box 1225 Red Deer, AB T4N 6S6	quarterly				
Bowhunter Magazine	Bowhunter Magazine Inc. 6405 Flank Dr. Harrisburg, PA 17112-2753 (717) 657-9555 Fax: (717) 657-9552 Advertising: Advertising Department	bi-monthly, with special editions each October (Big Game) and November (Whitetail). - for the hunting archer	$ 3,190	178,356 NE 4.1% U.S. Circ./Index 77 MA 15.8% US Circ./Index 105 SA 13.2% US Circ./Index 75 ESC 6.0% US Circ./Index 98 WSC 9.5% US Circ./Index 88 Largest readership is West North Central and Mountain areas, Index 158 and 142 respectively. Target 82,496 CPM $ 38.67	Activities in past year: whitetail hunting 86% small game hunting 32% black bear hunting 9% fishing 84% camping 70% hiking 38% photography 36% Ave. 5 days spent on hunting trip. 14% used a guide/ outfitter. Ave. annual expenditure on hunting travel (incl. outfitters) $1,545.	NBO

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Buckhunters Whitetail Magazine	Thicket Publishing Inc. P.O. Box 601 Helena, AL 35080 (205) 987-6007 Fax: (205) 987-2882 Advertising: Advertising Sales Director	10 issues Plus 3 special editions including "Buckhunters Whitetail Annual."	$ 2,500	150,000 NE 3.51% MA 12.34% SA 15.58% ESC 17.04% WSC 9.77% Target 87,360 58.24% CPM $ 28.62	Type of game hunted with bow: Whitetail 68% bear 4% Type of game hunted with rifle: whitetail 67% bear 26% coyote 16% duck 22% goose 18% pheasant 32% grouse/partridge 33% 20% hunted with a guide/outfitter in past year 24% plan to hunt with guide/outfitter in next yr 80% plan to hunt in Canada with an outfitter. 85% interested in fishing	
Buckmasters Whitetail Magazine	Buckmasters Ltd. 1020 Monticello Court Montgomery, Alabama 36117 (205) 271-3337 Fax: (205) 244-6523 Advertising: Margaret Ann Hall (205) 271-3337	6 issues/yr plus special issue. - Published by the Buckmasters Whitetail National Association (150,000 members).	$ 2,799 Outfitter advertisers must purchase ads in all 6 issues to be eligible to participate in outfitters video catalogue, to be distributed free to association's 150,000 members. Section in magazine, "Trophy Trips," oriented to hunting travel for trophy whitetail	153,698 Td 150,836 US NE 3.5% US Circ./Index 66 MA 14.7% US Circ./Index 97 SA 27.8% US Circ./Index 159 ESC 13.9% US Circ./Index 228 WSC 12.1% US Circ./Index 112 Target 108,602 CPM $ 25.77	The Assoc. produces a TV show which reaches 500,000 households, and is holding sportsmen's show 1st time this year in Atlanta, GA. Advertisers are encouraged to offer Assoc. members a minimum 5% discount. Type of hunting: Moose 11.9% Bear 33.8% Whitetail (out of state) 55.7% Turkey 83.6%	

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California Angler	1921 E. Carnegie Way, No. 3N Santa Ana, CA 92705-5310 (714) 261-9779 Fax (714) 261-9853	monthly - fresh & salt water fishing magazine	$ 1,122	25,000 CPM $ 44.88		
Canadian Hunting & Shooting	Canadian Outdoor Publications Inc. 140 Ave. F. North Saskatoon, SK S7L 1V8 (306) 665-6302 Fax: (306) 244-8859 Advertising: Doug Smith (Manager) (306) 665-6302	4 issues/yr plus special annual edition "Canadian Shooting Annual"	$ 3,431 Cdn $ 2,574 US	74,000 across Canada CPM $ 34.78	Type of hunting: whitetail deer 79.5% bear 36.1% duck 40.8% goose 32.9% moose 9.4% 51.1% combine fishing with hunting Have taken average of 5.4 hunting/fishing trips in past year Ave. expenditure on guides or outfitters in past year: $1,885 7.5% plan to hunt in the Maritimes with guides/outfitters. B.C. was rated as the most popular destination with 35.2% planning to hunt there.	
Canadian Bowhunting	Canadian Outdoor Publications Inc. 140 Ave. F. North Saskatoon, SK S7L 1V8 (306) 665-6302 Fax: (306) 244-8859 Advertising: Doug Smith (Manager) (306) 665-6302	4 issues/yr plus a special issue, "The Canadian Deer Hunting Annual"	$ 2,060 Cdn $ 1,545 US	52,000 across Canada CPM $ 29.72	Ave. expenditure on guides or outfitters in past year: $1,885	

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Canadian Angler	Canadian Outdoor Publications Inc. 140 Ave. F. North Saskatoon, SK S7L 1V8 (306) 665-6302 Fax: (306) 244-8859 Advertising: Doug Smith (Manager) (306) 665-6302	2 issues/yr	$ 1,631 Cdn $ 1,224 US	70,000 across Canada CPM 17.48	87.5% fished in past year Have taken average of 5.4 hunting/fishing trips in past year. Ave. expenditure on guides or outfitters in past year $1,885	
Canadian Sportfishing Magazine	Canadian Sportfishing Publications Ltd. 937 Centre Road Dept. 2020 Waterdown, ON L0R 2H0 (416) 689 1112 Fax: (416) 689 2065	5 issues/yr: 4 seasonal issues and 1 special edition				
Connecticut Valley Arms Black Powder Guns & Hunting	Harris Publications, Inc. 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	annually				
Deer & Deer Hunting	Krause Publications Inc. 700 E. State St., Iola, WI 54990 (715) 445-2214 Fax: (715) 445-4087	8 issues/yr dedicated to hunting of whitetail deer, focusing on techniques, deer biology, behaviour and management	$ 3,145	142,593 NE & MA 22.4% SA & ESC 28.0% WSC 7.8% Target 82,989 58.2% CPM $ 37.90	10.3% hunted with a guide/outfitter in past year 18.4% plan to hunt with guide/outfitter (29,440 readers) next year, 38.6% of which plan to hunt in Canada Type of hunting: whitetail 95.8% bear 0.9% wildfowl 78.2% small game 66.1% Ave. trophy hunts 39 days at	NBO

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Deer & Big Game Bowhunting	Harris Publications, Inc. 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	annually				
Dixie Gun Works Blackpowder Annual	Pioneer Press P.O. Box 684 Gunpowder Lane, Union City, Tennessee 38261 (901) 885-0374 Fax: (901) 885-0440 Advertising Editor (901) 885-0374	annually				
Eastern Woods & Waters	JPL Publishers Ltd. P.O. Box 428, Dartmouth, NS B2Y 3Y5 Advertising: Shawn Wells (902) 468-2682 Fax: (902) 468-3996	6 issues/yr - exclusively regional (Maritimes) in scope. Covers hunting, fishing, trapping, environmental concerns, wildlife management. - 6 issues include Fishing Annual and Hunting Annual editions.	$ 1,092 Cdn $ 819 US	12,350 New Brunswick 2,986 Nova Scotia 6,625 Nfld 1,487 P.E.I. 287 Quebec 191 Ontario 473 Subtl 12,049 Total Canada 12,215 U.S. 130 Foreign 5 Target 12,049 CPM $ 67.97	- Atlantic Canadian outdoor enthusiasts. Participation in Activities: camping 60% canoeing/kayaking 46% photography 42% snow shoeing 35% snowmobiling 31% X country skiing 30% bird watching 19% 82% participate or are interested in saltwater fishing. 59% fly fish	NBO

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Field & Stream	Times Mirror Magazines Inc. 2 Park Ave., New York, NY 10016 (212) 779-5000 Fax: (212) 779-5465 Main Advertising Office: 2 Park Ave., New York, NY 10016 Mid-West Advertising Office: Tom Morrison 625 North Michigan Ave., Chicago, IL 60611 Detroit Advertising Office: Don Murray 1000 Town Centre, Suite 1830 Southfield, MI 48075 Atlanta Advertising Office: Gerry Lagomarsino, Lagomarsino & Dempsey 3085 Paces Mill Rd., N.W. Atlanta, GA 30339 West Coast Advertising Office: Wayne Roche, The James G. Elliott Company 714 Olympic Blvd. Suite 1120 Los Angeles, CA 90015	monthly - hunting, fishing, camping, and boating 4 regional editions: West Edition (Pacific, Mountain region, and Western Canada) Northeast Edition (New England, Mid-Atlantic, Northern portion of South Atlantic region, and Eastern Canada) Southeast Edition (East South Central, and majority of South Atlantic) Midwest Edition (West North Central, East North Central, and Central Canada).	$ 78,820 (both magazines) $ 48,460 (national distribution Field & Stream) $ 36,340 (national distribution Outdoor Life) Distribution of both magazines. Northeast Edition $ 12,770 Southeast Edition $16,640 Advertisements run in both Field & Stream and Outdoor Life magazines	2,000,000 (Field & Stream) 1,500,000 (Outdoor Life) Regional Distribution for combined Field & Stream and Outdoor Life: West 726,000 Northeast 709,000 Southeast 924,000 Midwest 1,141,000 Total 3,500,000 Target (Northeast & Southeast): 1,633,000 CPM $ 48.27 (2 editions, both magazines)		NBO (East edition), NB
Fish & Game Finder Magazine	Fish Finder Industries, Inc. 1233 W. Jackson St. Orlando, FL 32805 (407) 425-0045 Fax (407) 425-1529	monthly - magazine covers fishing & hunting markets in 32 states through 21 regional editions. - magazine is product oriented.	$ 6,115 (for all editions) $ 493 per regional edition	273,500 total (free distribution) New England Edition 15,000 NY Edition 12,000 PA Edition 10,000 Texas Edition 10,000 South Carolina Edition 16,250 California Edition 12,500 Florida Edition 35,000 Georgia Edition 10,000 Target 120,750 CPM (8 editions) $ 32.66	80.5% hunters	

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Fishing World	Allsport Publishing Corp. 51 Atlantic Ave, Floral Park, NY 11001 (516) 352-9700 Fax: (516) 437-6841 Advertising: Northeast & Mid-Atlantic Region: Alpha/omega Group, Inc. 858 Collingwood Ave., Maywood, NJ 07607 (201) 845-5353 Fax: (201) 845-0685 South Region: The Powell Group, Inc. 4162-B Carmichael Ct. Montgomery, AL 33106 (205) 271-6100 Fax: (205) 271-6400 West Region: Richard Bahruth Associates 2127 Foothill Blvd., Suite 236 La Verne, CA 91750 (909) 392- 5754 Fax: (909) 392-4757 Midwest, Florida & Caribbean Region: Gary Caputi 118 Harding Dr. Bricktown, NJ 08724 (908) 899-5940 Fax: (908) 899-3912	6 issues/yr - for novice and experienced sport fishermen. Covers fresh and salt water fishing. - official publication of the Fishing Club of America. - magazine is no longer published in regional editions - March 1994 issue - "Fly Fishing Special"	$ 7,240 $ 3,620 "Adventures in Angling" Section	256,428 NE 4.7% US Circ./Index 89 MA 13.1% US Circ./Index 87 SA 20.0% US Circ./Index 114 ESC 5.9% US Circ./Index 97 WSC 12.0% US Circ./Index 111 Pac 14.6% US Circ./Index 93 Target 184,850 CPM $ 39.17	Ave. reader spends 44 days fishing per year. 47% fish with spouse 66% fish in lakes 41% fish in rivers/streams 45% fish in saltwater Game fished (Freshwater): Largemouth bass 63% Smallmouth bass 45% Salmon/Steelhead 37% Ave. reader spent 11 days outside home state on fishing vacations 26% of readers stay in fishing lodges/resorts while on overnight or extended fishing trips, while 48% camp. Favourite destinations include Canada.	NB

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Fishing & Hunting News (newspaper)	Fishing & Hunting News 511 Eastlake Ave. E. P.O. Box 19000 Seattle, WA 98109 (206) 624-3845 Fax (206) 340-9467	26 issues (every other week) (10 regional editions: Western Washington Eastern Washington Oregon Montana Colorado Mountain Southern California Northern California Texas Alaska hunting, fishing, & outdoor sports magazine - currently putting together 5-6 page piece on Canadian resorts	$ 3,630 (all editions) $ 438 Texas edition $ 375 Southern California Edition $ 616 Northern California Edition $293 Montana Edition ads runs in all 10 editions in classified section, or for any edition in the "News" section	114,718 - concentrated in 12 Western states. Regional Edition circulations: Montana 4,676/CPM $ 62.66 S. California 15,844/CPM $ 23.67 N. California 19,758/CPM $ 31.18 Texas 15,118/CPM $ 28.97 Target 55,396 CPM (all editions) $ 31.64	95% of readers Fish: 97% fish freshwater 56% fish saltwater 53% fish both 95% take fishing or hunting trips Type of game fished: Saltwater salmon 38% striped bass 12% Freshwater trout 79% salmon 43% smallmouth bass 28%	
Fishing Smart	Aqua-Field Publishing Company Inc. 66 West Gilbert St. Shrewsbury, NJ 077022 (908) 842-8300 Fax: (908) 842-0281 Advertising: Bernard & Associates U.S.A. and International Advertising Sales 3965 Gibraltar Drive Reno, NV 89509 (702) 825-8407 Fax: (702) 825-3392	2 issues/yr (January & April)	$ 1,740	160,000 NE 7,950 MA 15,550 SA 15,750 ESC 7,050 WSC 12,885 Pacific 10,600 Canada 4,665 Target 74,450 CPM $ 23.37	Favourite type of fishing: bass, trout, panfish walleye, muskie, perch, pike and crappie	

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Florida Sportsman	Wickstrom Publishers 5901 SW 74th St., Ste 310 Miami, FL 33143 (305) 661-4222 Fax (305) 284-0277	monthly - boating, fishing, camping, hunting, & conservation, although primarily focuses on fishing and boating	$ 2,680	108,435 Ttl 107,556 US NE 1.0% US Circ./Index 19 MA 2.7% US Circ./Index 18 SA 87.4% US Circ./Index 499 ESC 2.7% US Circ./Index 44 WSC 1.2% US Circ./Index 11 Target (SA region) 94,004 CPM $ 28.51	95.5% fish in salt water 61.4% fish in fresh water 44.8% hunt Type of hunting: big game 24.8% small game 9.8% game birds 26.7%	
Fly Rod & Reel (The Magazine of American Fly-Fishing)	Down East Enterprise Inc P.O. Box 370 Camden, ME 04843 (207) 594-9544 Fax: (207) 594-5144	6 issues/yr	$ 2,200	53,000 NE 12.4% MA 17.3% SA 9.9% ESC 2.2% WSC 4.9% Pac 19.8% Target 35,245 66.5% CPM $ 62.42	- very affluent fly fishermen - ave. reader fished 38 days last year & spent $2,780 doing so	NBO, NB
Fly Fisherman	Cowles Magazines 6405 Flank Dr. P.O. Box 8200 Harrisburg, PA 17105-8200 (717) 657-9555 Fax: (717) 657-9526	6 issues/yr	$ 5,063	128,335 Ttl 108,520 US NE 9.3% US Circ./Index 175 MA 16.7% US Circ./Index 111 SA 10.2% US Circ./Index 58 ESC 2.2% US Circ./Index 36 WSC 4.9% US Circ./Index 45 Pac 23.8% US Circ./Index 152 Canada 8.6% of total circ Highest readership in Mountain area 17.5% US Circ./Index 308 Target 72,817 67.1% CPM $ 69.56		NB

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Flyfishing	Frank Amato Publications 4040 S.E. Wister, Portland, OR 97222 Advertising: P.O. Box 82112 Portland, OR 97282 (503) 653-8108 Fax: (503) 653-2766	5 issues/yr - both fresh & salt water fishing and fly tying. Emphasis is on catch and release.	$ 1,885	40,000 West Coast (Mountain and Pacific regions) 56% Upper East Coast (New England, Mid Atlantic, north part of South Atlantic) 21% Great Lakes (East North Central and part of West North Central)10% Other States 8% Canada/Foreign 5% Target (West Coast & Upper East Coast regions) 30,800 77% CPM $ 61.20	- readers are very conservation minded - 12% indicated they would like to fish in New Brunswick, while 18% were interested in flyfishing in Nova Scotia (The fishing destinations receiving the highest interest were the Rockies (54%), Alaska (48%), Pacific Northwest (47%), and B.C. (38%)) 61% of readers stay at lodges Preferred fishing: trout 97% bass 39% Pacific Salmon 38% Atlantic Salmon 11%	NB
Fur-Fish-Game (Harding's Magazine)	A. Harding Publishing Company Advertising: Fur-Fish-Game 2878 E Main St. Columbus, OH 43209 (614) 231-9585 Fax: (614) 231-5735	monthly - established 1905	$ 2,385	102,107 Td 97,739 US Distribution: NE 5.6% US Circ./Index 106 MA 17.4% US Circ./Index 115 SA 6.8% US Circ./Index 39 ESC 4.5% US Circ./Index 74 WSC 4.0% US Circ./Index 37 Pac 4.5% US Circ./Index 29 Target 41,832 42.8% CPM $ 57.01 Highest readership is WNC, 20.9% US Circ./Index 294		

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Game & Fish Magazine	Game & Fish Publications, Inc. P.O. Box 741 2250 Newmarket Pkwy, Ste 110 Marietta, GA 30061 (404) 953-9222 Fax (404) 933-9510	monthly - published in 30 editions: <u>South Region:</u> ALABAMA GAME & FISH ARKANSAS SPORTSMAN FLORIDA GAME & FISH GEORGIA SPORTSMAN KENTUCKY GAME & FISH LOUISIANA GAME & FISH MISSISSIPPI GAME & FISH MISSOURI GAME & FISH N. CAROLINA GAME & FISH OKLAHOMA GAME & FISH S. CAROLINA GAME & FISH TENNESSEE SPORTSMAN TEXAS SPORTSMAN VIRGINIA GAME & FISH W. VIRGINIA GAME & FISH <u>Midwest Region:</u> GREAT PLAINS GAME & FISH (includes ND, SD, NE, KS) ILLINOIS GAME & FISH INDIANA GAME & FISH IOWA GAME & FISH MINNESOTA SPORTSMAN MICHIGAN SPORTSMAN OHIO GAME & FISH WISCONSIN SPORTSMAN <u>East Region:</u> MID-ATLANTIC GAME & FISH (includes DE, NJ, MD) NEW ENGLAND GAME & FISH (includes CT, ME, MA, NH, RI, VT) NEW YORK GAME & FISH PENNSYLVANIA GAME & FISH <u>West Region:</u> CALIFORNIA GAME & FISH ROCKY MOUNTAIN GAME & FISH (includes MT, ID, WY, NV, UT, CO, NM, AZ) WASHINGTON/OREGON GAME & FISH	$ 7,895 (all 30 editions) Advertising cannot be purchased by individual issue but is rather sold by region. An ad will appear in all the magazines in each region purchased. South Region Editions $ 4,990 Midwest Region Editions $ 3,700 East Region Editions $ 1,650 West Region Editions $ 1,495	450,000 total all editions CPM $ 16.11 South Region Editions: 240,000 CPM $ 20.79 Midwest Region Editions: 160,000 CPM $ 23.13 East Region Editions: 50,000 CPM $ 33.00 West Region Editions: 40,000 CPM $ 37.38	98% of readers fish. 92% of readers hunt.	

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Gray's Sporting Journal	Gray's Sporting Journal (div. of North American Publications, Inc.) 713 Broad St Augusta, GA 30901 (706) 722-6060 Fax: (706) 724-3873 Advertising: Fox Associates, Inc (6 offices) New York Office: 212-725-2106 Fax (212) 779-1928	6 issues/yr - hunting & fishing magazine	$ 2,080	30,000 CPM $ 69.33		NBO
Gun Dog	Stuver Publishing Co., Inc 1901 Bell Ave., Ste. 4 P.O. Box 35098 Des Moines, IA 50315 (515) 243-2472 Fax (515) 243-0233	6 issues/yr - upland bird and waterfowl hunting	$ 2,310	58,109 Td 56,330 US NE 4.8% US Circ./Index 91 MA 9.8% US Circ./Index 65 SA 11.5% US Circ./Index 56 ESC 4.5% US Circ./Index 74 WSC 9.4% US Circ./Index 87 Target 22,532 40% CPM $ 102.52 Highest circ. is in Mountain (7.2% US Circ./131 Index) and WNC (20.1% US Circ./283 Index).	Readership are avid, affluent sportsmen 93% upland bird 59% waterfowl 57% small game 55% big game 77% fish Average annual expenditure on hunting travel: $1,003	
Guns & Hunting	Harris Publications, Inc. 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	6 issues/yr - has outfitters advertising section	$2,310	127,000 NE 6.05% MA 13.61% SA 16.19% ESC 11.81% WSC 9.80% Target 72,974 CPM $ 31.66	Type of game hunted: deer 95.4% small game 76.1% upland Bird 61.5% big game 55.1% waterfowl 37.4%	

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Hounds and Hunting	Hounds and Hunting P.O. Box 372 Bradford, PA 16701 (814) 368-6154 Fax (814) 368-3522	monthly - hunting and field sports magazine	$ 405	9,008 CPM $ 44.96	founded 1903	
New England Fisherman	L.I. Fisherman Publishing Corp. 14 Ramsey Rd., Shirley, NY 11967-4704 (516) 345-5200 Fax (516) 345-5304	weekly - regional magazine on sport fishing published in 5 editions - trout and salmon special issue in March	$3,585 (all 5 editions)	92,000 New England Edition 17,000 New Jersey Edition 26,000 Mid Atlantic Edition 11,000 Subtl 54,000 CPM $ 38.97 (all editions)		
North American Hunter	North American Outdoor Group Inc. 12301 Whitewater Dr., Ste. 260 Minnetonka, MN 55343 (612) 936-0555 Fax: (612) 936-9755	7 issues/yr	$ 10,170	576,310 NE 4.61% MA 15.85% SA 14.32% ESC 6.08% WSC 8.49% Total circ. has grown from 155,000 in 1988 to 575,000 in 1993. Target 284,409 49.35% CPM $ 35.76	Ave. hunted 31 days in past 12 months, and 79% also fished. Ave. expenditure of $1,105 on hunting trips/yr. Type of game hunted: bear 15% whitetail 76% ducks/geese 36% grouse 22% pheasants 33%	NB
North American Whitetail	Game & Fish Publications Inc 2250 Newmarket Parkway, Suite 110 Marietta, Georgia 30067 Advertising: (404) 953-9222 Fax: (404) 933 9510	8 monthly issues/yr: July - February	$ 2,695	169,928 Td 168,672 US NE 4.4% US Circ./Index 83 MA 13.7% US Circ./Index 91 SA 21.3% US Circ./Index 122 ESC 10.5% US Circ./Index 172 WSC 11.5% US Circ./Index 106 Target 103,565 61.4% CPM $ 26.02		

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North American Fisherman	North American Outdoor Group Inc. 12301 Whitewater Dr., Ste. 260 Minnetonka, MN 55343 (612) 936-0555 Fax: (612) 936-9755	6 issues/yr	$ 10,550	440,211 NE 4.50% MA 12.15% SA 13.62% ESC 5.04% WSC 9.38% Pac. 13.8% Highest state circulation in California - 7.75% Total Circ. has grown from 40,000 in 1988 to 440,000 1993 Target 257,479 58.49% CPM $ 40.97	Ave. fished 50 days in past 12 months, and 41% also hunted. Ave. expenditure of $900 on fishing trips/yr. Species fished: smallmouth bass 47% trout 29%	NB
Ontario Out of Doors	Ontario Out of Doors 227 Front St. E., Suite 100 Toronto, ON M5A 1E8 (416) 368-0185 Fax: (416) 941-9113	10 issues/yr - official magazine of Ontario Federation of Anglers & Hunters - fishing, hunting and camping magazine	$ 3,380 Cdn $ 2,536 US	87,909 CPM $ 28.85	90% of readership are fishermen Also put on the Spring Fishing Show and The Hunting & Outdoor Show in Toronto annually	
Outdoor Life	Times Mirror Magazines Inc. 2 Park Ave., New York, NY 10016 (212) 779-5000 Fax: (212) 779-5465	monthly - outdoor sports magazine	$ 36,340	1,500,000 (See information on Field & Stream magazine for distribution and advertising rates)		Nfld
Outdoor Canada	Outdoor Canada Publishing Group Advertising: Outdoor Canada 703 Evans Ave., Suite 202 Toronto, ON M9C 5E9 (416) 695-0311 Fax: (416) 695-0382	9 issues/yr: Fishing Edition, March, April, May, Summer (June/July), September, October, November, Winter (December/January) magazine for Canadian sportsmen	$ 6,500 Cdn $ 4,876 US	133,286 CPM $ 36.58		

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Petersen's Hunting	Petersen Publishing Company 6420 Wilshire Blvd., Los Angeles, CA 90048-5515 Advertising: Dan Doran (213) 782-2196 Fax: (213) 782-2867	monthly - sport hunting magazine	$ 5,700	334,555 Td 310,789 US NE 3.9% US Circ./Index 74 MA 13.3% US Circ./Index 88 SA 15.8% US Circ./Index 90 ESC 6.6% US Circ./Index 108 WSC 12.1% US Circ./Index 112 Target 160,678 51.7% CPM $ 35.47		NBO
Petersen's Bowhunting	Petersen Publishing Company 6420 Wilshire Blvd., Los Angeles, CA 90048-5515 (213) 782-2196 Fax: (213) 782-2867 Advertising Offices: New York Office: 437 Madison Ave., 28th fl New York, NY 10022 (212) 935-9150 Fax: (212) 319-8443 Dallas Office: 800 West Airport Freeway Suite 201 Irving, TX 75062 (214) 579-0454 Fax: (214) 579-0589	monthly	$2,560	110,000 Td 105,160 US NE 4.0% MA 14.13% SA 14.17% ESC 6.69% WSC 9.96% Target 51,476 48.95% CPM $ 49.73	100% own a bow. Ave. spent 25 days bowhunting last year, and 82.8% also fished.	
Remington Sportsman	Harris Publications Inc. 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	annually - new publication this year. Published jointly by Remington Arms and Harris Publications. The publication is distributed to new owners of Remington rifles and is sold in newsstands.	$ 2,200	200,000 - newsstands in Canada and the U.S. CPM $ 11.00	- high end 96.6% participate in hunting/shooting 80.2% fish	

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
RGS Magazine (Ruffed Grouse Society Magazine)	Ruffed Grouse Society 451 McCormick Road Coraopolis, PA 15108 National Office: (412) 262-4044 Advertising: Bernard & Associates U.S.A. and International Advertising Sales 3965 Gibraltar Drive Reno, NV 89509 (702) 825-8407 Fax: (702) 825-3392	5 issues/yr	$ 715	21,287 CPM $ 33.59	Readers are "very active" in Upland Bird Hunting, and "active" in Fly Fishing and travel.	NBO
Salmon Trout Steelheader	Frank Amato Publications P.O. Box 82112 Portland, OR 97282 (503) 653-8108 Fax (503) 653-2766	6 issues/yr - featuring salmon, trout, and steelhead sport fishing - travel section focuses on Alaska and B.C.	$ 1,050	31,000 West Coast (Mountain and Pacific regions) 76% Great Lakes (East North Central and part of West North Central) 10% Upper East Coast (New England, Mid Atlantic, northern part of South Atlantic) 9% Canada/Foreign 4% Other States 1% Top States: Oregon 25.4% California 23.8% Washington 20.3% Target (West Coast region) 23,560 CPM $ 44.57	Preferred fishing: steelhead 90% salmon 89% trout 78% bass 45% Favourite fishing areas: rivers & streams 100% lake 65% Offshore 62% Type of hunting: deer 52% duck 22% geese 18% bear 7%	

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Scientific Anglers Fly Fishing Quarterly	Aqua-Field Publishing Company Inc. 66 West Gilbert St. Shrewsbury, NJ 077022 (908) 842-8300 Fax: (908) 842-0281 Advertising: Bernard & Associates U.S.A. and International Advertising Sales 3965 Gibraltar Drive Reno, NV 89509 (702) 825-8407 Fax: (702) 825-3392	4 issues/yr plus special issue "Fly Fishing Made Easy"	$ 2,045	113,100 NE 7,950 MA 15,550 SA 15,750 ESC 7,050 WSC 12,885 Pacific 10,600 Canada 4,665 Target 74,450 CPM $ 27.47		
Sentier Chasse-Peche (French)	Le Groupe Polygone Editeurs, Inc. 11450 Albert-Hudon Montreal, PQ H1G 3J9 (514) 327-4464 Fax: (514) 327-0514	11 issues/yr - hunting, fishing, and conservation magazine	$ 4,355 Cdn $ 3,267 US	65,733 Quebec 97.62% Ontario 1.49% New Brunswick 0.77% Foreign 0.21% CPM $ 49.70	- readers are largely blue collar	NBO
Shooting Sportsman - The Magazine of Wingshooting & Fine Guns	Down East Enterprise Inc. P.O. Box 370 Camden, ME 04843 (207) 594-9544 Fax: (207) 594-5144	6 issues/yr - company is expanding and expecting to increase circulation significantly in near future.	$ 1,375	6,329 NE 7.9% US Circ. MA 15.5% US Circ. SA 17.1% US Circ. ESC 4.4% US Circ. WSC 11.2% US Circ. Canada 1.3% Foreign 0.5% Target 3,551 56.1% CPM $ 387.21	<u>Type of Hunting:</u> upland bird 91% waterfowl 74% small game 51% big game 48% Fishing 74%	

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
Southern Outdoors	B.A.S.S. Inc. P.O. Box 17915 Montgomery, AL 36141 (205) 272-9530 Fax (205) 279-7148	9 issues/yr - outdoor magazine covering fishing, hunting, camping, & outdoor recreation	$ 4,495	251,719 CPM $ 17.86		
Sporting Classics	Bernard & Associates 3965 Gibraltar Drive Reno, Nevada 89509 (702) 825-8407 Fax (702) 825-3392	6 issues/yr - focus on fishing & hunting adventures around the world - March/April 1994 issue will have a special feature section on **Canada's** hunting and fishing product	$ 2,955 $ 2,120 (Adventures Section)	32,422 NE 1,283 MA 2,270 SA 3,888 ESC 1,070 WSC 1,974 Pacific 2,536 Target 13,021 CPM $ 162.81	82% of readership are affluent, avid fishermen (bass, trout, salt-water) 82% are hunters 79% waterfowl 76% upland game 60% big game 58% of readers travelled out-of-state/out-of-country last year to hunt or fish 35% stay in hunting/fishing lodges Ave. reader took 5 vacation flights last year	
Sportsman's Hunting Yearbook	Harris Publications 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	annually - sold only via newsstand - glossy & newsprint sections				

MAGAZINE	PUBLISHER/ADVERTISING CONTACT	FREQUENCY/ DESCRIPTION OF MAGAZINE	AD RATES (US$) (B & W page, 1 X ad)	CIRCULATION and CPM (US$)	READERSHIP PROFILE	CODE
The Fisherman	14 Ramsey Rd. Shirley, NY 11967 (516) 345-5200 Fax (516) 345-5304	weekly - 5 editions - local fresh & salt water sport fishing	$ 3,585 (for all 5 editions) $ 707 New England Edition $ 1,205 Long Island/Metro New York Edition $ 1,004 New Jersey Edition $ 439 Mid-Atlantic Edition (includes part of South Atlantic region) $ 418 Florida Edition	92,000 per week Regional Edition Circulations: New England Edition 17,000 Long Island/NY Edition 29,000 New Jersey Edition 25,000 Mid-Atlantic Edition 11,000 Florida Edition 10,000 Target 92,000 CPM $ 25.05 (all editions)	91.8% prefer saltwater fishing 9.0% prefer fresh water fishing 52.3% fish in both salt/fresh water. 5% prefer salmon fishing and travel to fish for it	
The Trapper and Predator Caller	Krause Publications 700 East State St. Iola, WI 54990 (715) 445-2214 Fax (715) 445-4087	monthly - caters to the trapping market	$ 417	32,500	73.7% are active shooters 92.1% are active hunters Type of hunting: big game 84.5% small game 76.4% predators 70.5% upland bird 69.8% waterfowl 42.0%	NBO
The Maine Sportsman (newsprint)	The Maine Sportsman Box 365 Augusta, ME 04330 (207) 846-9501 Fax: (207) 846-1434	monthly - covering Maine hunting & fishing topics	$ 700	29,601 95% New York/New Jersey/New England Target 28,121 CPM $ 24.89		NBO

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The Complete Deer Hunting Annual	Harris Publications Inc. 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	annual				
The Maritime Sportsman (newsprint)	The Maritime Sportsman Box 4321, Station A Fredericton, NB E3B 5G4 Advertising: (506) 459-8657 Fax: (506) 450-0680	monthly		4,000		NBO
The In Fisherman (The Journal of Freshwater Fishing)	In Fisherman Inc. Two In Fisherman Dr., Brainerd, Minnesota 56401-0999 (218) 829-1648 Fax (218) 829-3091 Advertising: 218-829-9416	7 issues/yr: Dec/Jan, February, March, April, May/June, July/August/Sept., Oct/Nov.	$ 8,475	320,906 Td 306,665 US NE 3.6% US Circ./Index 68 MA 13.8% US Circ./Index 91 SA 7.3% US Circ./Index 42 ESC 3.3% US Circ./Index 54 WSC 3.9% US Circ./Index 36 Pac 5.9% US Circ./Index 38 Highest circulation in WNC, 21.4% US Circ./Index 301, and ENC, 35.7% US Circ./Index 211. Target 115,919 37.8% CPM $ 73.11	59,000 readers fished in Canada in past yr. 16,000 readers took 2 or more Canadian fishing trips 69% very interested in Canada as a fishing trip or vacation 18.4% took overnight fishing trips to Canada in past yr. 7,400 readers want to take a fishing trip to **New Brunswick** (12,800 readers indicated Nova Scotia) (The most popular Canadian destinations are Ontario (133,800 readers), Manitoba (40,300), and NWT (35,000). <u>Type of game fished.</u> smallmouth bass 93.7% salmon 17.3% trout 30.5% <u>Type of fishing.</u> fly fishing 39.5% freshwater fishing 94.2% saltwater fishing 20.3% Ave. of 46 days spent fishing in past year	NB

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Thicket's Hunting & Fishing Guide	Thicket Publishing Inc. P.O. Box 601 Helena, AL 35080 (205) 987-6007 Advertising: Advertising Sales Director (205) 987-6007	5 issues/yr	$ 3,325	150,000 NE 5.56% MA 12.21% SA 11.43% ESC 8.80% WSC 7.22% Pac. 14.86% Target 90,120 60.08% CPM $ 36.90	92% prefer firearm 81% prefer bow 30% prefer muzzleloader 92% hunted and 94% fished more than 4 times in past year.	
Traditional Bow Hunter	TBM Inc. P.O. Box 15583 Boise, Idaho 83715 Advertising: Belinda Fischer (208) 853-0555 Fax: (208) 375-8022	6 issues/yr	$1,100	50,000 NE & MA 18% WSC, ESC, SA 30.3% Target 24,150 48.3% CPM $ 45.55		
Trout Unlimited	Bernard & Associates 3965 Gibraltar Drive Reno, Nevada 89509 (702) 825-8407 Fax (702) 825-3392	- distributed to members - covers trout as well as salmon		75,000 Main areas of distribution: New England 8-10,000 New York 3-4,000 Pennsylvania 8,000 California 8,000 Washington 6,000 Michigan 3,000 Coloroda 5,000 Wisconsin 3-4,000		
Waterfowl Magazine	Waterfowl Magazine Waterfowl U.S.A. The Waterfowl Building P.O. Box 50 Edgefield, SC 29824 (803) 637-5767 Fax 9803) 637-0037	6 issues/yr - official publication of Waterfowl U.S.A., a non-profit organization for preserving waterfowl.	$ 1,050	20,000 (members of Waterfowl U.S.A.) CPM $ 52.50	97% hunters 75% own hunting dogs	

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Western Outdoors	Western Outdoors Publications 3197-E Airport Loop Dr. Costa Mesa, CA 92626 (714) 546-4370 Fax (714) 662-3486	9 issues/yr - hunting and fishing magazine aimed at the active California sportsman	$ 2,787	112,086 Td 111,379 US NE 1.0% US Circ./Index 19 MA 3.8% US Circ./Index 25 SA 4.0% US Circ./Index 23 ESC 1.7% US Circ./Index 28 WSC 4.8% US Circ./Index 44 Pac. 49.6% US Circ./Index 316 Target 72,285 64.9% CPM $ 38.56	91% of readers fish 40% are fly fishermen 51% fish saltwater Type of fishing: freshwater trout & salmon 64.5% 58% of readers hunt Type of Hunting: big game 57% small game 40% upland game 42% waterfowl 26%	
Whitetail Strategies	Harris Publications 1115 Broadway, New York, NY 10010 (212) 807-7100 Fax: (212) 627-4678	5 issues/yr - caters to whitetail deer hunting	$2,100	200,000 NE: 5.3% MA 13.3% SA 17.1% ESC 16.1% WSC 10.1% Target 123,800 61.9% CPM $ 16.96	- whitetail deer hunters	
Wildfowl	Stover Publishing Co., Inc. 1901 Bell Ave., Ste. 4 P.O. Box 35098 Des Moines, IA 50315 (515) 243-2472 Fax (515) 243-0233	6 issues/yr - magazine for duck and goose hunters	$ 1,611	33,792 Td 32,691 US NE 4.6% US Circ./Index 87 MA 9.9% US Circ./Index 66 SA 13.3% US Circ./Index 76 ESC 6.9% US Circ./Index 113 WSC 9.2% US Circ./Index 85 Highest circ. WNC (15.4% US Circ./Index 217), and ENC (23.9% US Circ./Index 141). Target 14,351 43.9% CPM $ 112.26	Type of hunting: waterfowl 98% upland bird 75% small game 55% big game 52% Fishing 82% Ave. annual expenditure on hunting travel: $1,153.	

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Wing & Shot	Stover Publishing Co., Inc. 1901 Bell Ave., Ste. 4 P.O. Box 35098 Des Moines, IA 50315 (515) 243-2472 Fax (515) 243-0233	6 issues/yr - magazine for upland bird hunters	$ 1,463	18,712 Td 18,344 US NE 4.8% US Circ./Index 87 MA 9.7% US Circ./Index 64 SA 11.3% US Circ./Index 65 ESC 5.1% US Circ./Index 84 WSC 8.4% US Circ./Index 78 Highest circ. WNC (16.9% US Circ./Index 238), ENC (24.0% US Circ./Index 142), and Mountain (7.6% US Circ./Index 138). Target 7,209 39.3% CPM $ 202.94	Type of hunting: upland bird 98% small game 60% big game 57% waterfowl 50% Fishing 70% Ave. annual expenditure on hunting travel: $1,200.	
OVERSEAS MAGAZINES						
Trout and Salmon (U.K.)	Publisher: Robert MacDonald Advertising: Trout and Salmon EMAP Pursuit Publishing Ltd. Bretton Court, Bretton Peterborough PE3 8DZ, U.K. 01144 733 264666 FAX: 01144 733 265515	monthly	£ 1,187 $ 1,781 US £ 3,396 ($5,095 US) "Where in the World" section of magazine (on foreign fishing trips) (includes spot colour)	50,667 CPM $ 35.15		
Salmon Trout & Sea-Trout (U.K.)	Publisher: Andrew Graham-Stewart Advertising: Gamefishing Publications Ltd. 8 The Square, Aberfeldy Perthshire, PH152DD, U.K. 01144 887 820082 Fax: 01144 887 829626	monthly	£ 802 $ 1,203 US	17,779 Td 16,444 U.K. CPM $ 73.16	- affluent game fishers	

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Angelwoche (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- angling magazine				
Rute und Rolle (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- angling magazine				
Der Angler und Naturfreund (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- angling magazine				
Blinker (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- angling magazine				
Deutsche Jagd-Zeitung (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- hunting magazine				
Pirsch (Germany)	Canadian Consulate, Dusseldorf Karl-Heinz Limberg 01149 211 172170 Fax 01149 211 359165	- hunting magazine				

Index = Geographic Distribution of % Circulation ÷ % Population

MASTER LIST OF CONSUMER SHOWS

CONSUMER SHOW MASTER LIST

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
All Canada Show 11 Midwest U.S. Shows: St. Louis, MO Chicago West, (St. Charles), IL Milwaukee, WI Quad Cities IL/IA Des Moines, IA Springfield, IL Rockford, IL Madison, WI Omaha, NE Green Bay, WI	Bay-Lakes Marketing Inc. All Canada Show Joel Prunty Senior Show Director N 8915 State Rd. 57 Luxemburg, WI 54217 1-800-325-6290 Fax (414) 866-9047	St. Louis, Missouri Jan 6 - 9, 1994 Des Moines, Iowa Feb 10 - 13, 1994 Omaha, Nebraska Feb 7 - 9, 1994	St. Louis, Missouri $ 860 US Des Moines, Iowa $ 820 US Omaha, Nebraska $ 595 US		11 Midwest U.S. markets - shows promote **only Canadian** outdoor adventure destinations
Allegheny Sport, Travel and Outdoor Show, Monroeville (Pittsburgh), PA	Expositions Inc. P.O. Box 550 Edgewater Branch Cleveland, OH 44107-0550 (216) 529-1300 Fax: (216) 529-0311	February 16 - 20, 1994	$ 525 US 10 x 10	87,900	
American and Canadian Sport Travel and Outdoor Show (57th Annual), Cleveland, OH	Expositions Inc. P.O. Box 550 Edgewater Branch Cleveland, OH 44107-0550 (216) 529-1300 Fax: (216) 529-0311	March 18 - 27, 1994	$ 680 US	287,000 (1993)	
Anaheim Sports Vacation & RV Show, Anaheim, CA	H. Werner Buck Enterprises Attn: Marilyn Goward, Sales Director 3031 West Burbank Blvd. Burbank, CA 91505 (818) 841-9850				

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Atlantic Outdoor Sports and R.V. Show, Prospect (Halifax), NS	Atlantic Outdoor Sports and R.V. Show P.O. Box 2968 Dartmouth East, NS B2W 4Y2 (902) 434-5535 Fax (902) 827-3939	March 17-20, 1994	$ 400 Cdn 10 x 10 102,000 sq ft	23,500 (1993) expect 25,000 1994	- hunting & fishing are major components of show - RV's, boats, camping, also Origin: Atlantic Canada, Quebec, Ontario, Eastern U.S.
Birmingham Sport, Boat & Travel Show, Alabama	Double C. Productions Inc. Exhibition Manager P.O. Box 1678 Huntsville, TX 77342-1678 (409) 295-9677		Space 180,000'	80,000 (1991)	- leisure sports, latest boats, & tourism exhibitors
Buckmasters Country Jam Expo 1994, Atlanta, GA	Buckmasters Ltd. 1020 Monticello Court Montgomery, Alabama 36117 (205) 271-3337 Fax: (205) 244-6523 Advertising: Neal Cole (205) 271-3337	July 8 - 10, 1994 Held in Georgia Dome, Atlanta.	$300.00 US before Jan 1 $400.00 US after Jan 1 Booth size 8' x 10'	n/a (1st time this year)	Consumer show oriented to whitetail deer hunters.

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Chicagoland Sport Fishing, Travel and Outdoors Show, Rosemont, Illinois	Troy Pickett Chicagoland Sport Fishing, Travel and Outdoors Show 191 South Gary Avenue Carol Stream, IL 60188-2092 1-800-323-5155 Fax (708) 260-0395	January 28 - February 6, 1994	$750.00 US 10 x 10 Ttl space 200,000 sq ft 1,000 exhibitors	500,000 est.	Main Origin: Illinois Iowa Wisconsin Minnesota Michigan Ohio Kentucky Iowa Canada - show focuses on fishing primarily but getting more into hunting now also. 75% fishing/25% hunting orientation - big interest in bow hunting
Cincinnati Travel Boat and Sport Show, Cincinnati, Ohio	D. Hart (513) 281-0022	January, 1994			
Deer Show, Springfield, IL	Target Communications (414) 242-3990 Fax (414) 242-7391	March 1994			
Denver Sportsmen's Show, Denver, Colorado	To-Ro Enterprises P.O. Box 25348 Portland, OR 97225-0348 (503) 246-8291 Fax (503) 246-1066	January 12 - 16, 1994	$600.00 US 150,000 sq ft	41,381 (1993)	36% fish 33% hunt

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Eastern Fishing and Outdoor Exposition, Worcester, MA	Eastern Fishing and Outdoor Exposition Inc. Attn: Paul Fuller P.O. Box 4668 Portsmouth, NH 03802-4668 (603) 431-4315 Fax: (603) 431-1971	February 3 - 6, 1994	$560.00 US		
Eastern Fishing Outdoor EXPO, Philadelphia, PA	Eastern Fishing and Outdoor Exposition Inc. Attn: Paul Fuller P.O. Box 4668 Portsmouth, NH 03802-4668 (603) 431-4315 Fax: (603) 431-1971	January, 1994			
Eastern Sports, Boat, Camping, Travel, and Outdoor Show, Harrisburg, PA	Reed Exhibition Companies 221 Columbus Ave. P.O. Box 35 Boston, MA 02117-0035 (617) 859-3446 Fax: (617) 536-8719	February 5 - 13, 1994	$650.00 US		
Fall Sportsmen's Show, Portland, OR	To-Ro Enterprises Attn: Michael O'Loughlin P.O. Box 25348 Portland, OR 97225-0348 (503) 246-8291 Fax (503) 246-1066				

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Fish & Tackle Show, Fort Worth, Texas	Fin & Feather J. Poole (817) 551-1219 Fax (817) 572-1349	April (1993)			
Fishing EXPO, Saratoga Springs, NY	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	(February 19 - 21, 1993)			
Garden State Outdoor Sportsmen's Show (11th Annual), Edison, NJ	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	January 13 - 16, 1994	$550.00 US		
Great Northeastern Sport Show, Syracuse, NY	C. Hengst (315) 824-3227	January 27 - 30, 1994			
Great Lakes Fishing and Outdoor Exposition, Buffalo, NY	Eastern Fishing and Outdoor Exposition Inc. Attn: Paul Fuller P.O. Box 4668 Portsmouth, NH 03802-4668 (603) 431-4315 Fax: (603) 431-1971	February 17 - 20, 1994	$450-550 US		
Greater New York Fishing & Hunting EXPO, Kingston, NY	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	(February 11 -14, 1993)			

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Greater Connecticut Outdoor Sportsmen's Expo, New Haven, Connecticut	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	March 10 - 13, 1994	$450 US		
Greater Detroit Sportfishing Expo (6th Annual), Detroit, MI	Expositions Inc. P.O. Box 550 Edgewater Branch Cleveland, OH 44107-0550 (216) 529-1300 Fax: (216) 529-0311	March 3 - 6, 1994	$ 475 - 550 US	54,100 (1993)	
Greater Philadelphia Sport, Travel and Outdoor Show, Fort Washington, PA	Eastern Fishing and Outdoor Exposition Inc. P.O. Box 4668 Portsmouth, NH 03802-4668 (603) 431-4315 Fax: (603) 431-1971	January 19 - 23, 1994	$650 US		
Hunting & Fishing Show, Richmond, VA	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	February 1994			
International Sport Fishing Exposition, Fort Lauderdale, Florida	Show Management, Inc. (305) 764-7642 (800) 940-7642	(October 28 - November 1, 1993)			
International Sportsmen's Exposition, San Mateo, CA	International Sportsmen's Expositions Attn: Steve Doty P.O. Box 2569 Vancouver, WA 98668-2569 (206) 693-3700 Fax (206) 693-3997	March 9 - 13, 1994	$ 750 US	38,000-40,000	

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
International Sportsmen's Exposition, Sacramento, CA	International Sportsmen's Expositions Attn: Steve Doty P.O. Box 2569 Vancouver, WA 98668-2569 (206) 693-3700	January 19 - 23, 1994	$ 650 US	32,000-38,000	
International Sportsmen's Exposition, Denver, Colorado	International Sportsmen's Expositions Attn: Steve Doty P.O. Box 2569 Vancouver, WA 98668-2569 (206) 693-3700 Fax (206) 693-3997	February 16 - 20, 1994	$ 650 US	38,000-42,000	
Maryland Outdoor Sports and Travel Show, Upper Marlboro, Maryland	Scott Communications Inc. Suite 202, 14626 Main Street Upper Marlboro, MD 20772 (301) 952-1400 Fax: (301) 952-1144	January 21-23, 1993	$500-650 US		
Mid-Atlantic Hunting and Fishing Show, Timonium, Maryland	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	January 28 - 30, 1994	$400 US		
Minnesota Sportsmen's Boat, Camping & Travel Show, St. Paul, MN	(612) 755-8111	January 1994			

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Montréal Sportsmen's Show (Chasse et Pêche de Montréal), Montréal, Québec	Les Salons des Sportsmen (Outdoor Canada/The Sportsmen's Shows) 1155, Metcalfe, Bur. 915 Montréal, PQ H3B 2V5 (514) 866-5409 Fax: (514) 866-4092 Paul Fournier	March 30 - April 3, 1994	$825 Cdn 10 x 10 Show space 200,000 sq. ft. (275 exhibitors, including 125 outfitters and lodges)	60,800 attendance (1993)	Target market: strong interest in hunting, fishing, and camping. Origin: Montreal CMA or one-hr drive
National Fly Fishing Show (3rd annual), Boston, MA	The Outdoor Group Bill Anderson Sales Manager P.O. Box 370 Camden, ME 04843 (207) 594-9544 Fax: (207) 594-7215	January 21 - 23, 1994	$ 575 US Booth 10 x 10 Show space 50,000 sq ft, 100 exhibitors	4,000 (1993) 5,000-6,000 expected 1994	fly fishing only
New Hampshire Sportsman Show (2nd Annual), Manchester, NH	County Sportsman, Inc. P.O. Box 406 Mahopac Falls, NY (914) 621-2815 Fax (914) 621-2815	January 27 - 30, 1994	$200 US		
New Brunswick Sportsman's Show, Woods and Waters, Moncton, NB	K.C. Promotions Inc. Attn: Karl Chase (506) 450-9602 Fax: (506) 450-1338	Second weekend in September	$ 395 Cdn Booth 10 x 10	9,000 (show is in 2nd year and gaining in popularity) Show space for 200 exhibitors	Majority of consumers come from 100 mi radius from Moncton, Saint John, north shore NB. Majority of attendees are hunters/anglers.
New Brunswick Sportsman's Show, Woods and Waters, Fredericton, NB	K.C. Promotions Inc. Attn: Karl Chase (506) 450-9602 Fax: (506) 450-1338	April 22 - 24, 1994 (2nd weekend)	$ 395 Cdn Booth 10' x 10' 146 exhibitors	16,000 attendance Show covers hunting, fishing, camping, and hiking.	Origin: 100-150 mi radius of Fredericton including Newcastle, Woodstock, and Maine. Maj. are hunters and/or anglers. Soft adventure interest on increase. Show is renowned to be the largest sportsmen's show in the Maritimes.

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Ohio Game Fair, Columbus, Ohio	Ohio Game Fair 1809 Hightower Dr. Columbus, Ohio 43235 (614) 798-9356 Fax (614) 299-9691	September 9 - 12, 993)			
Ontario Fishing & Sportsmen's Show, Pickering, Ontario	Outdoor Canada/ The Sportsmen's Shows 703 Evans Ave. Suite 202 Toronto, ON M9C 5E9 (416) 695-0311 Fax: (416) 695-0382	January 27 - 30, 1994	$ 675 Cdn 10 x 10 50,000 sq ft 150 exhibitors	20,000	fishing, hunting, conservation
Ottawa Boat & Sportsmen's Show, Ottawa, Ontario	Outdoor Canada/ The Sportsmen's Shows 703 Evans Ave. Suite 202 Toronto, ON M9C 5E9 (416) 695-0311 Fax: (416) 695-0382	February 16 - 20, 1994	$ 750 Cdn 10 x 10 67,000 sq ft 150 exhibitors	30,000	- boating, hunting, fishing, camping
Pacific Northwest Sportsmen's Show, Portland, Oregon	To-Ro Enterprises P.O. Box 25348 Portland, OR 97225-0348 (503) 246-8291 Fax: (503) 246-1066	February 9 - 13, 1994	$600 US 265,000 sq ft	42,836 (1993)	33% fish 34% hunt
Quebec City Sportsmen's Show (Chasse et Pêche de Québec), Québec City, Québec	Les Salons des Sportsmen (Outdoor Canada/The Sportsmen's Shows) 1155, Metcalfe, Bur. 915 Montréal, PQ H3B 2V5 (514) 866-5409 Fax: (514) 866-4092 Paul Fournier	March 17 - 20, 1994	$620 CDN 10 x 10 Show space 29,000 sq ft. (100 exhibitors, including 50 outfitters)	14,383 attendance	Target market: strong interest in hunting, fishing, and camping. Soft adventure interest on increase. Origin: Quebec City or 1-hr drive
San Francisco Chronicle Outdoor Show, San Francisco, CA	Gary Reynolds (414) 786-5600	March 5 - 7, 1994			adventure consumers

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Saratoga Springs Hunting and Fishing Show, Saratoga Springs, NY	Jack Kerr Outdoor Sportsmen's Shows P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	January 6 - 9, 1994	$325 US		
Seattle Sportsmen's Show, Seattle, Washington	To-Ro Enterprises P.O. Box 25348 Portland, OR 97225-0348 (503) 246-8291 Fax: (503) 246-1066	February 2 - 6, 1994	$600 US 140,000 sq ft	35,677	31% fish 32% hunt
Sport and Boat Show, Sacramento, CA	Sacramento Sport Show P.O. Box 19333 Sacramento, CA (916) 482-8190 Fax (916) 481-2230				
Sport Fishing RV & Golf Show, Palm Springs, CA	Fred J. Hall & Associates 15236 Greenleaf Street Sherman Oaks, CA 91403 (818) 784-3036 Fax (818) 784-4523				
Sport, Boat and Travel Show, Tulsa, Oklahoma	Chas Taber (214) 742-2626				
Sportsmen's Show, Springfield, MA	Frank Sousa (413) 594-2085	February 1994			
Sportsmen's Show, Boston, MA	Frank Sousa (413) 594-2085				

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Syracuse Sportsmen's Show, Syracuse, NY	B. Borchers (413) 594-2085	March, 1994			
Texas International Sportsmen's Exposition: Game Coin, San Antonio, Texas	International Sportsmen's Expositions Attn: Steve Doty P.O. Box 2569 Vancouver, WA 98668-2569 (206) 693-3700 Fax (206) 693-3997	February 23 - 27, 1994	$ 650 US	expecting 40,000	first show 1994 - general profile of International Sportsmen's Expo: 44% anglers 12% hunters 38% anglers/hunters
The Hunting and Fishing Show, Houston, Texas	TM Productions P.O. Box 820076 Houston, TX 77282-0076 (713) 589-7991 Fax (713) 589-7376 Attn: Robbie Miller	February 3 - 6, 1994 - show has a trophy deer display	$ 400 US 10 x 10		
The Hunting and Outdoor Show (13th Annual), Toronto, Ontario	Ontario Out of Doors 227 Front St. E., Suite 100 Toronto, ON M5A 1E8 (416) 368-0185 Fax: (416) 941-9113	September 10 - 12, 1994	$ 850 Cdn Booth 10' x 10'	30,000 paid adults (approx. 40,000 total attendance)	Only all-hunting show in Canada and largest all-hunting show in North America. Show sponsored by: Ontario Out of Doors; Canadian Federation of Hunters and Anglers; and Canadian Sportfishing Federation. Most consumers from Ontario (180 km radius); some from U.S. (NY, PA.)
The Hunting and Fishing Show, Austin, Texas	TM Productions P.O. Box 820076 Houston, TX 77282-0076 (713) 589-7991 Fax (713) 589-7376 Attn: Robbie Miller	February 11 - 13, 1994 - show has a trophy deer display	$ 350 US 10 x 10		

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
The Hunting and Fishing Show, Beaumont, Texas	TM Productions P.O. Box 820076 Houston, TX 77282-0076 (713) 589-7991 Fax (713) 589-7376 Attn: Robbie Miller	March 11 - 13, 1994 - show has a trophy deer display			
The South Jersey Hunting and Fishing Show, Pennsauken, NJ	Jack Kerr P.O. Box 450 Greentown, PA 18426 (717) 676-9900 Fax (717) 676-9977	March 17 - 20, 1994	$ 500 US		
The Spring Fishing Show, Toronto, Ontario	Ontario Out of Doors 227 Front St. E., Suite 100 Toronto, ON M5A 1E8 (416) 368-0185 Fax: (416) 941-9113	February 18 - 20, 1994	$ 850 Cdn Booth 10' x 10' Designated fly-fishing show area: 35,000 sq ft. Show space 185,000 sq ft.	40,000 paid adults (1st year in 1992) (children free)	100% consumer fishing show. Show sponsored by: Ontario Out of Doors; Canadian Federation of Hunters and Anglers; and Canadian Sportfishing Federation.
Toronto Sportsmen's Show, Toronto, Ontario	Outdoor Canada/ The Sportsmen's Shows 703 Evans Ave. Suite 202 Toronto, ON M9C 5E9 (416) 695-0311 Fax: (416) 695-0382	March 11 - 20, 1994	$ 1,045 Cdn 450,000 sq ft 625 exhibitors	185,000	fishing, camping, RV's, conservation, boating
Westchester County Sportsman Exposition, White Plains, NY	County Sportsman, Inc. P.O. Box 406 Mahopac Falls, NY (914) 621-2815 Fax (914) 621-2815	February 3 - 6, 1994	$ 550 US 10 x 10 30,000 sq ft	25,000	Origin: NY CT NJ - all types of hunting and fishing
Western Fishing and Tackle Show, San Diego, CA	Fred J. Hall & Associates 15236 Greenleaf Street Sherman Oaks, CA 91403 (818) 784-3036 Fax (818) 784-4523	March 16-20, 1994	$ 700 US 10 x 10 800,000 sq ft		- 42% from Los Angeles County - 70% fish

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Western Fishing and Tackle Show, Long Beach (Los Angeles), CA	Fred J. Hall & Associates 15236 Greenleaf Street Sherman Oaks, CA 91403 (818) 784-3036 Fax (818) 784-4523	March 2-6, 1994	$ 750 US 10 x 10 650,000 sq ft (inside & out)		- 42% from Los Angeles County - 70% fish
WNY Outdoor Adventure Expo, Buffalo, NY	S. Concilla (814) 725-3856	March 10 - 13, 1994			
World Fishing and Outdoor Exposition, Suffern, NY	Eastern Fishing and Outdoor Exposition Inc. Attn: Paul Fuller P.O. Box 4668 Portsmouth, NH 03802-4668 (603) 431-4315 Fax: (603) 431-1971	March 2 - 6, 1994	$666 US		
OVERSEAS SHOWS					
Atelier Canada, Paris, France	B. Couet Paris 144433200	(November 1993)			Customer Segment: Culture & Nature, Outdoor Activities, Sport & Entertainment Target Audience: Travel Trade
Canada Marketplace, Frankfurt, Germany					
Country Landowners' Association (CLA) Game Fair, U.K. (Scotland in 1993)	CLA Edinburgh, Scotland 074-324-2127				Target Audience: Angling & Hunting

SHOW & LOCATION	CONTACT	DATE(S)	BOOTH FEE/SIZE	ATTENDANCE	PROFILE
Fishing & Hunting Show, Germany (Proper name unknown)	Canadian Consulate, Dusseldorf, Germany	April 28 - May 3, 1995 - held every second year.			
London Anglers Show, London, U.K. (1991)		(April 1991)			
National Angling Exhibition, Esher, England	Tom Pickering Angling Promotions Ltd. 305 Ballards Lane London, N12 8NP England 01144-81-446-8211 Fax 01144-81-445-5842	April 16-17, 1994	£ 810 (9 metres square)		Target Audience: Course & Game Anglers
World Travel Market, London (Consulate participates in)	613-954-3844	(November 15 - 19, 1993)			Target Audience: Travel Trade, M&IT Organisers & Media
World Angling Championships Exhibition, Nottingham, England	Tom Pickering Angling Promotions Ltd. 305 Ballards Lane London, N12 8NP England 01144-81-446-8211 Fax 01144-81-445-5842	September 3-4, 1994	£ 660 (6 metres square) £ 990 (9 metres square)	expecting 30,000	- first time championship show in U.K. in 12 years

LIST OF OTHER CONSUMER SHOWS

In addition to the consumer shows presented in this Exhibit, there were several shows identified in the outfitter survey which we were unable to obtain information on. Some of these shows may already be listed in the Exhibit since some respondents in the outfitter survey indicated only general show locations. These consumer shows/locations are as follows:

Albany, NY
Alton, PA
Augusta, ME
Bloomsburg, PA
Bolton Valley, VT
Boston Outdoor Adventure
Boston Exposition, MA
Buck Fever Show, Maryland
College Park, Maryland
Dixie Deer Classic, NC
Fly Fishing Annual, NJ
Frederick County Fair, MD
Glens Falls, NY
Hartford, CT
Life Style, Fredericton, NB
Meadowland Show, NJ
National Rifle Association
NE Yankee Sports Alliance, VT
OSEG, Boston/Vermont
Outdoor Sports Exposition, Syracuse, NY
Outdoors Northeast Fishing & Sportsmen's Show, Boston, MA
Palmetto Sportsmen's Classic, Columbia, NC
Raleigh, NC
Rochester, NY
Safari Club International Convention, Orlando, Florida
Utica Sports Show,
Utica, NY
Watertown, NY
Western Virginia
Wilderness Adventure, PA